entrée.NET

Software for the Food Distribution Industry

Guide for Sales Representatives

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Chapter 1

Signing In to entrée.NET

1 Signing In to entrée.NET

The first time you start using our system, you will be presented with the Account Setup Wizard dialog. Once you complete the Account Wizard process you will use the **Account Settings** section of your **Home** tab to change your password (rather than the one we assigned you), change your time zone and add/edit email addresses you would like to use.

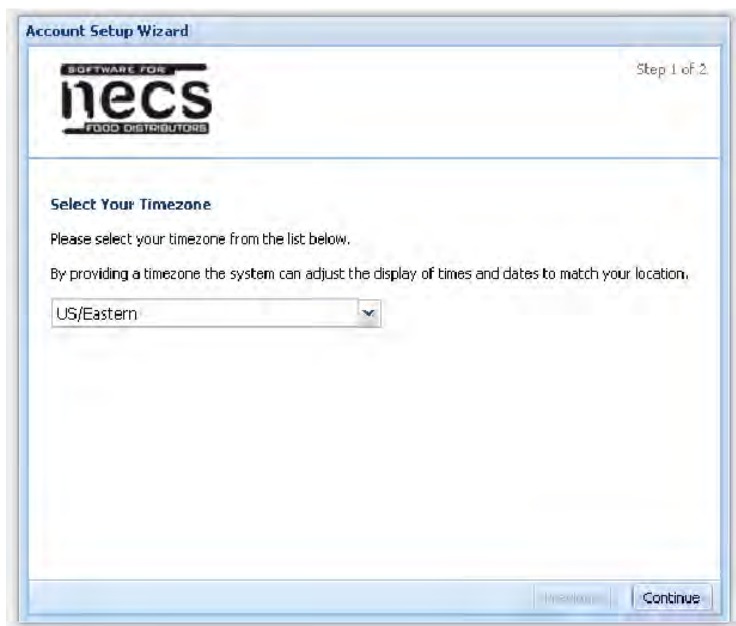
Use the **Customer Login** area of the website home page to login once your account in setup.

1. Visit the **Home** page of our company website.
2. In the **Customer Login** section enter the **Username** and **Password** we assigned you.
3. Click the **Login** button.

4. The **Account Setup Wizard** dialog will begin.
5. Wizard Step 1 **Time Zone:**

   Select your time zone from the drop down list.

   Then click **Continue**.

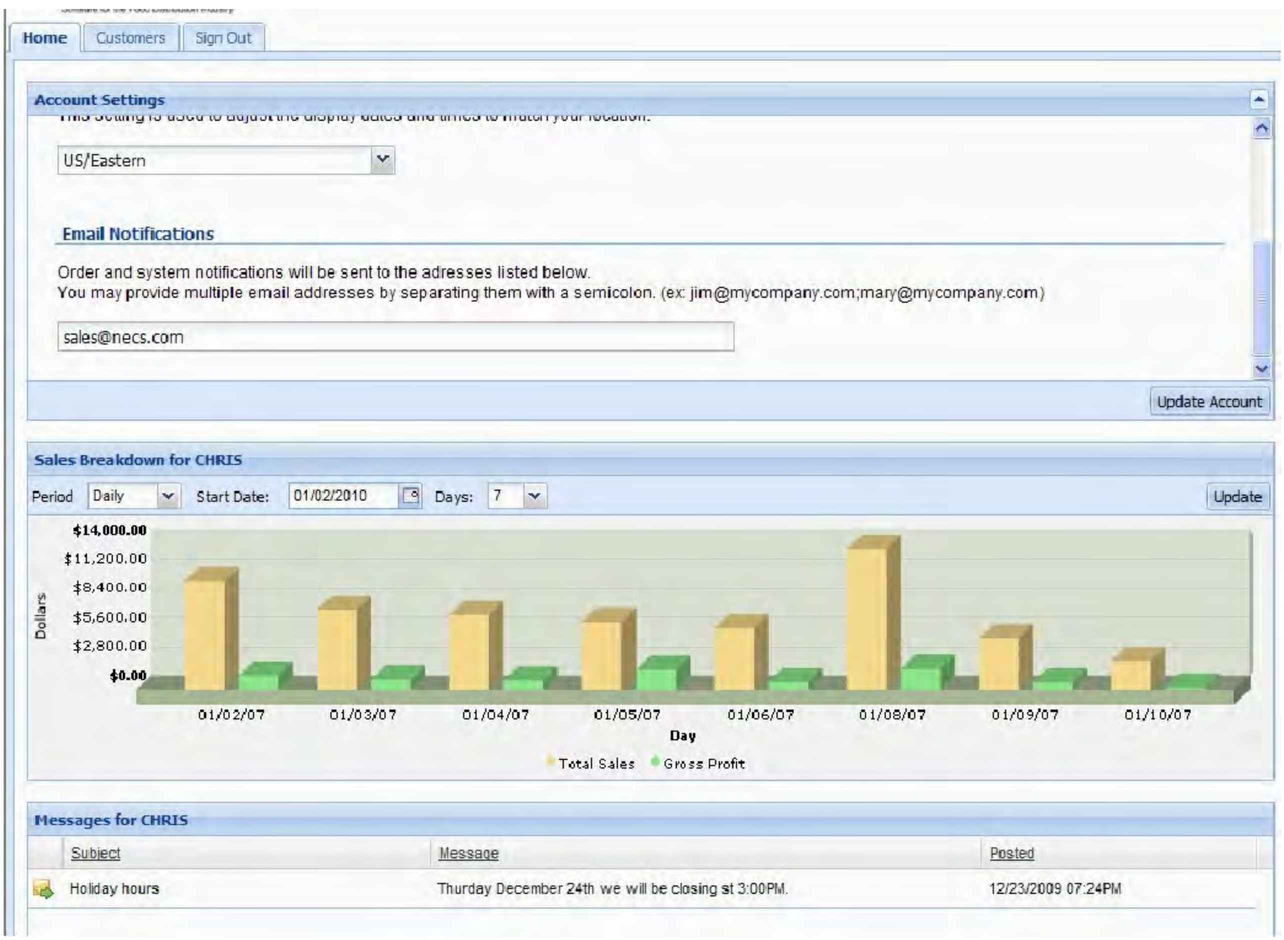


6. Wizard Step 2 **Email Setup**:

   Enter the email address(s) that will be used for notifications for your account. Separate multiple emails addresses with a semi colon.

7. Click **Finish.**

8. You will be brought to the Salesperson **Home** page of the **entrée.NET** system**.**



Chapter 2

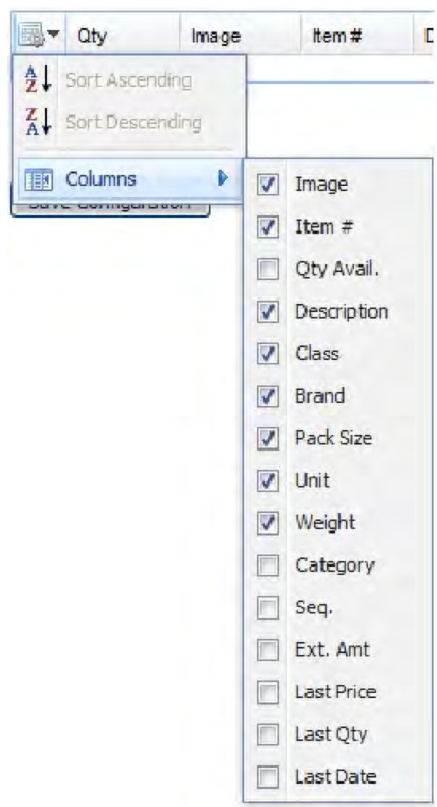
Tips

2 Tips

Hot Tip! Here are some tips you should be aware of when using the system:

- Be sure to maximize your browser window to easily view all the information.
- Underlined column headings, such as Item # and Brand, can be clicked to sort the screen in ascending or descending order by that column.
- The Delivery Date you select may impact item pricing if you choose to receive items after the special pricing period is over.
- Check the **Specials** page to view our weekly sale items. Selecting "**All**" in the "**View Specials By**" drop down menu lists every sale item.

- **entrée.NET** allows you to customize the display of column information in the Standard Order, Search and Quick Entry Grids.
- Columns available include; Item, Description, Class, Brand, Pack Size, Unit, Weight, Qty Avail., Category, Seq., Ext. Amt, Image, Last Price, Last Qty and Last Date.
- Click the tools icon  to view the drop down menu to add or remove columns from the display.
- Check the box to add a column and remove the check to delete a column from the grid.



Password Tips

Having a strong password is an important protection for your business. Follow these guidelines to create a secure password.

- Field length; minimum 8 and maximum of 20 characters.
- Use a mix of numbers, letters, symbols and punctuation.
- Use a mix of upper and lower case letters.
- Create a unique password that you can remember.
- If you write down your password keep it in a safe secure place, not at your computer.
- Do not store passwords in a file on your computer.

Forgot Your Password?

You have the ability to use an automated process to reset your own password through our website. Just visit our website Login area and follow this simple procedure.

1. Click the **Forgot Password** link.
2. The Lost Password Reset section is displayed. Enter your **Username** and displayed verification code in the box then click the **Send Request** button.
3. This screen will display “Thank you. An email has been sent to your account with directions to reset your password.”
4. This action will send you an email which contains a temporary password and a link to our password reset web page.
5. Here you will enter your **Username**, temporary password and your new password.
6. If all of your information is correct, your password will be reset in the **entrée.NET** system.

See the **Customer Tab** chapter for more information about resetting passwords.

Email Access

Our business has two options available for email processing. You can use WebMail accessed via a web browser or use the mail client software already running on your computer.

Contact our **entrée.NET** System Administrator to have your email account created, to assist you with mail client software setup and to access WebMail. For detailed information see the Accessing Email and WebMail chapter.

Ordering Tips

- Find items and update the quantities ordered using the up/down arrows.
- Look for the red sale tag icons  to take advantage of our sales and break pricing opportunities.
- When you roll your mouse over the red sale tag you have the option to “Click to view additional sale information.”
- When you click the red sale tag the yellow area below the item will display pricing information and sale dates.
- Don’t forget to check the **Specials** page for our weekly sales.
- To remove an item from your order set the quantity to zero in your shopping cart. This will remove the item automatically.
- Click the **product name link** in the “**Description**” column to view more details about the item.

Connect to websites containing nutritional informational about the products you buy. This is the information from the **Weblink** from the Product Information above.

Searching for Items

- To help you find items, use the "Search" feature which is at the top of the **Catalog**, **Standard Order**, and **Quick Entry** tabs. You can change how the search will work by hitting the drop down arrow in the Search area. The Search normally defaults to "Item Description," but you can also search by "Class," "Brand," or "Item Number."

- To search, enter the text of what you are looking for in the keyword area. The keyword area accepts full or partial words.

- Next hit the **Enter** key or click the magnifying glass icon to begin the search.

- When you enter a keyword to search, the system will display all items which contain that word. For example, if you search by "Item Description" and enter "Pickle" as your keyword, all of our items which contain the word "Pickle" anywhere in the product description or class name will be displayed.

Example An example of the customer Catalog page when searching for "Pickle."

Chapter 3

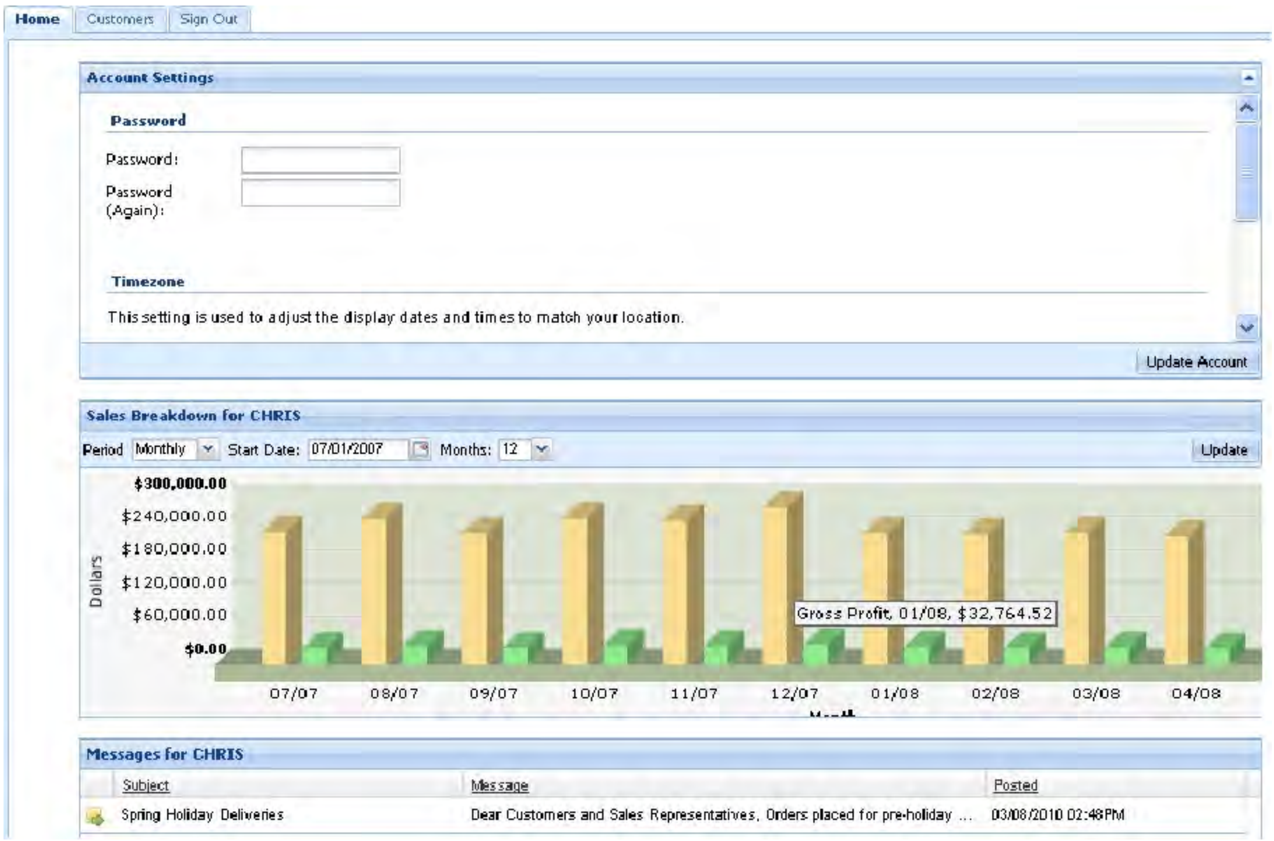
Home Tab

3 Home Tab

The sales force can take full advantage of **entrée.NET** when managing your customer orders. You can access **entrée.NET** anywhere an Internet connection is available, whether you are in your office, at home or on the road.

Once you login, you a bar graph that shows the breakdown of your sales on either a daily, weekly or yearly basis are displayed. If implemented the customer call list for the day is displayed with all the customer information your DSR needs for the call. If you have access to Gross Profit information, this will be displayed on the graph as well.

Hot Tip! When you hover over a column with your mouse the gross profit is displayed.



3.1 Account Settings

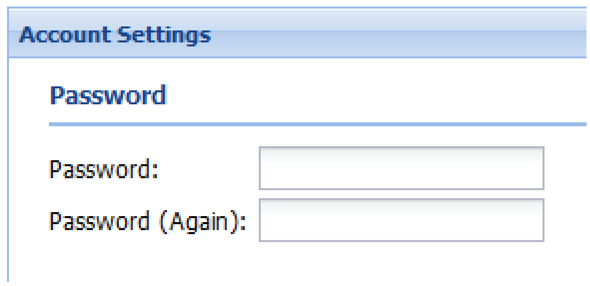
The **Account Settings** area allows you to change/edit the following settings:

- **Password**
- **Time Zone**
- **Date Filtered Standard Order**
- **Email Notifications**

You can show/hide this area by clicking anywhere on the **Account Settings** bar. When your information has been changed, click the **Update Account** button and it will be saved.

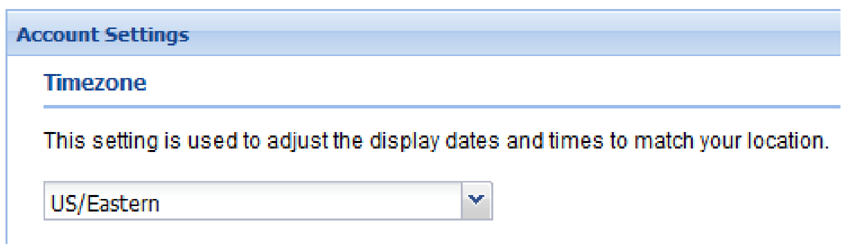
Password

Update and personalize your password, typing it in a second time as a confirmation.



Timezone

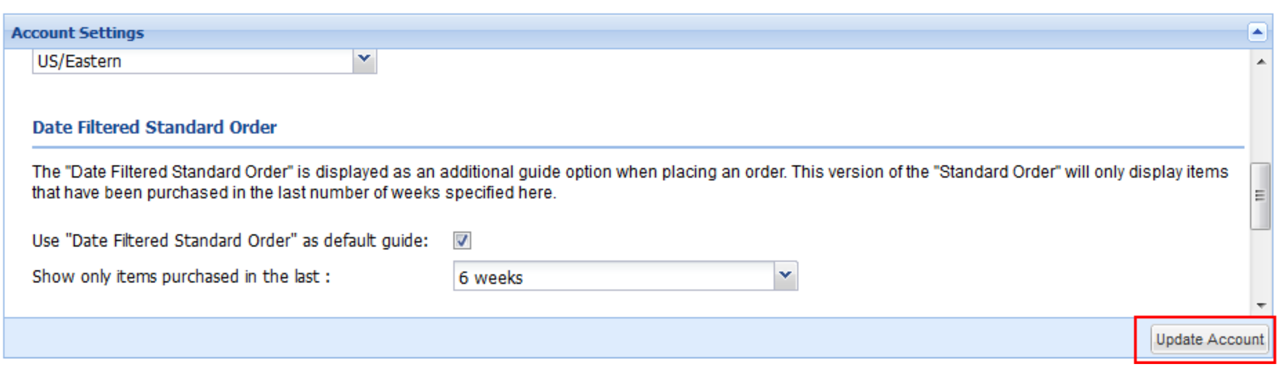
Update your **Timezone** by selecting it from the drop down menu.



Date Filtered Standard Order

This feature allows you to view a copy of your customer's "Standard Order" showing only items that you have recently purchased. The guide can be set as the default order guide and is available in the **Guide** drop down menu of the **Standard Order** tab.

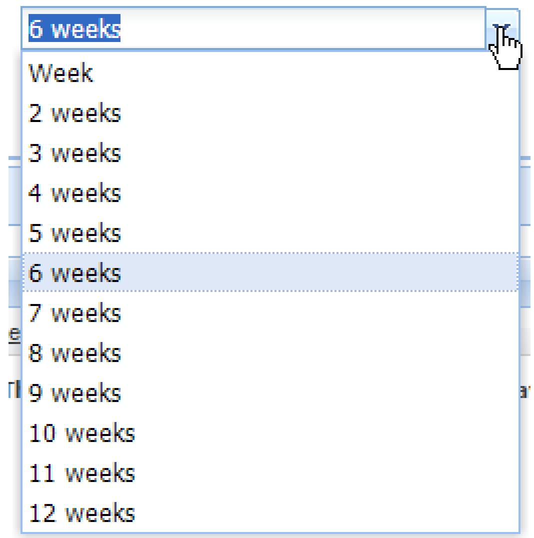
Note **This feature must first be turned on by your System Administrator before you can utilize it.**



Setting up Date Filtered Standard Order

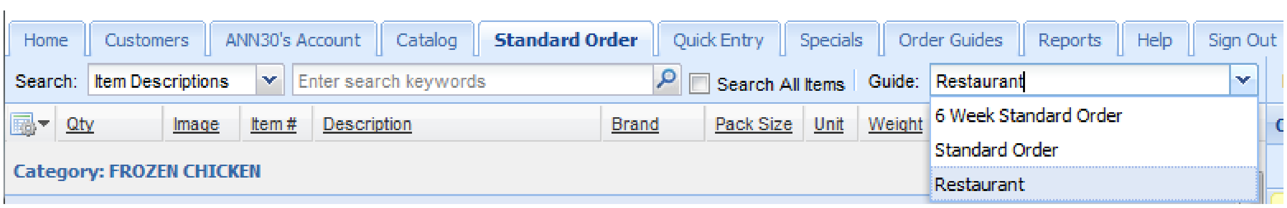
1. **Use "Date Filtered Standard Order" as default -** Check the box to set this as your default Standard Order guide.

2. **Show only items purchased in the last -** Use the drop down list to select time spans from 2 to 12 weeks for date filtering. The number of weeks will default to 6 weeks if no selection is made.



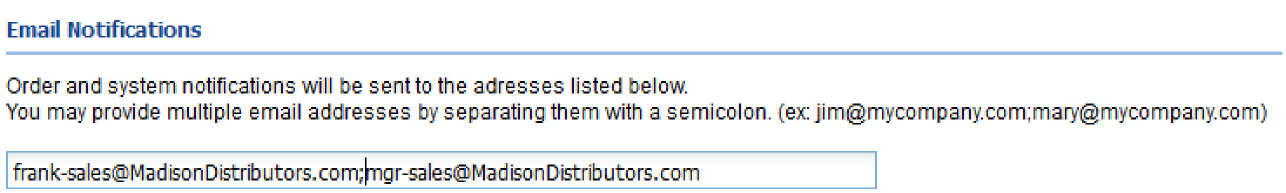
3. Click **Update Account**.

4. Once the salesperson selects a customer to work with, the **Standard Order** tab will have the date filtered "**X** week Standard Order" option visible in the **Guide** drop down menu where "**X**" is the number of weeks selected.



Email Notifications

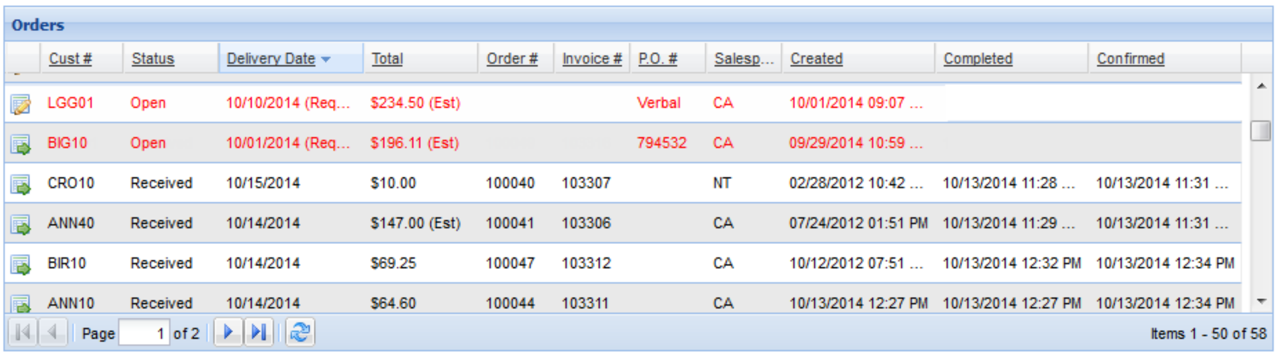
Update and add email addresses in the "**Email Notifications**" area. Multiple email addresses can be entered into the list by typing a semi colon between each email address.



3.2 Orders Panel

The **Orders** panel has been added to the salesperson **Home** tab to allow you to view open and completed orders for all the customers assigned to you. Use this panel to directly view or edit your customer's orders without first finding and loading the full customer account into **entrée.NET**.

- Use the **Edit / View Order** icon to open and continuing working on an open order.
- Use the **View Order** icon to view the pending or completed order details.



Orders

Cust #	Status	Delivery Date	Total	Order #	Invoice #	P.O. #	Salesp...	Created	Completed	Confirmed
LGG01	Open	10/10/2014 (Req...	$234.50 (Est)			Verbal	CA	10/01/2014 09:07 ...		
BIG10	Open	10/01/2014 (Req...	$196.11 (Est)			794532	CA	09/29/2014 10:59 ...		
CRO10	Received	10/15/2014	$10.00	100040	103307		NT	02/28/2012 10:42 ...	10/13/2014 11:28 ...	10/13/2014 11:31 ...
ANN40	Received	10/14/2014	$147.00 (Est)	100041	103306		CA	07/24/2012 01:51 PM	10/13/2014 11:29 ...	10/13/2014 11:31 ...
BIR10	Received	10/14/2014	$69.25	100047	103312		CA	10/12/2012 07:51 ...	10/13/2014 12:32 PM	10/13/2014 12:34 PM
ANN10	Received	10/14/2014	$64.60	100044	103311		CA	10/13/2014 12:27 PM	10/13/2014 12:27 PM	10/13/2014 12:34 PM

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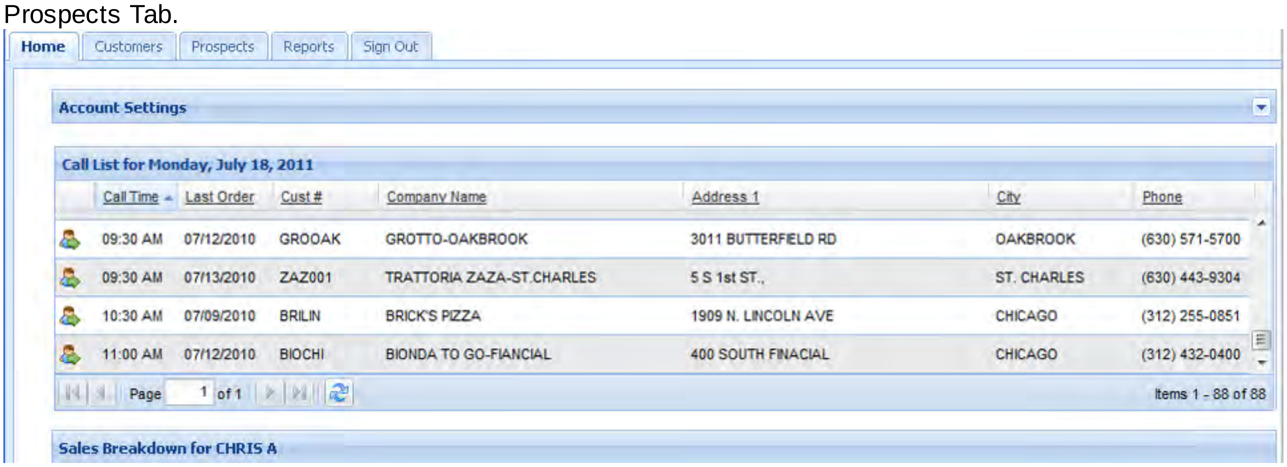
3.3 Call List

Manage your customer calls using the **Call List** feature. Your System Administrator will update customer files to assign salespeople to customers and set call times. When a salesperson logs into **entrée.NET** they will find their customer **Call List** for that day on the **Home** tab.

- **Load Customer** icon is used to view the customer's account information.
- **Call Time** column shows the scheduled call time from the customer file in **entrée**.
- **Last Order** column shows date of the last order.
- **Cust #** column shows the Customer number from **entrée**.
- **Company Name** column shows company name.
- **Address 1 City** column shows the street address.
- **Phone** column shows the phone number.

Note This image belongs to a salesperson who is also a Prospects Manager that is why you see a Prospects Tab.



Home | Customers | Prospects | Reports | Sign Out

Account Settings

Call List for Monday, July 18, 2011

Call Time	Last Order	Cust #	Company Name	Address 1	City	Phone
09:30 AM	07/12/2010	GROOAK	GROTTO-OAKBROOK	3011 BUTTERFIELD RD	OAKBROOK	(630) 571-5700
09:30 AM	07/13/2010	ZAZ001	TRATTORIA ZAZA-ST.CHARLES	5 S 1st ST.,	ST. CHARLES	(630) 443-9304
10:30 AM	07/09/2010	BRILIN	BRICK'S PIZZA	1909 N. LINCOLN AVE	CHICAGO	(312) 255-0851
11:00 AM	07/12/2010	BIOCHI	BIONDA TO GO-FIANCIAL	400 SOUTH FINACIAL	CHICAGO	(312) 432-0400

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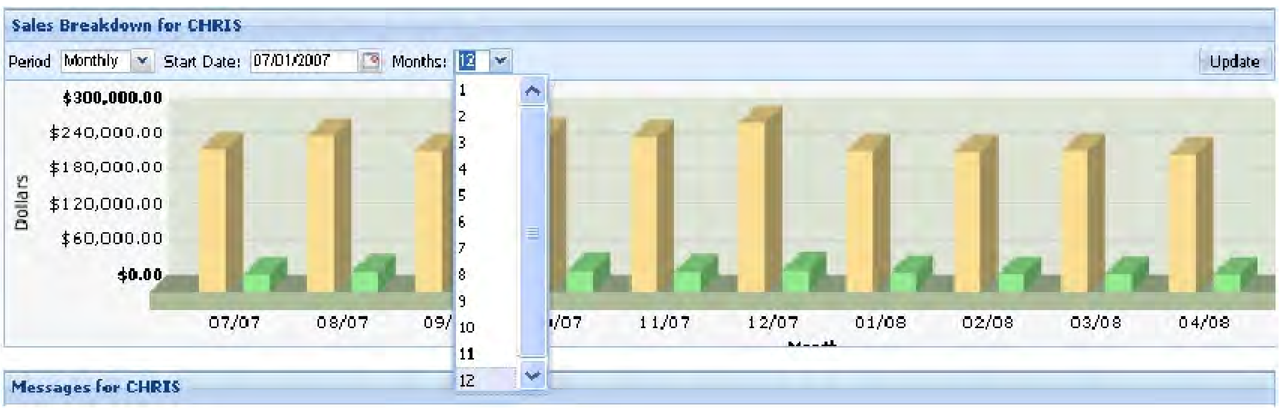
Sales Breakdown for CHRIS A

3.4 Sales Breakdown

Salespeople can view graphs detailing their sales on a daily, weekly or yearly basis, as well as gross profit, if enabled by the System Administrator.

You can create your own customized charts by using these chart options:

- **Period**: Your options are Daily, Weekly or Monthly.
- **Start Date**: Enter a date or use the calendar tool to select a date.
- **Number of Days/Weeks/Months**: The field name and drop down list numbers will change according to your selection for the **Period** field. You can select the desired number of days 1 - 7, weeks 1 - 12 or months 1 - 12 from the drop down list.
- Once your chart options are set, click the **Update** button Update to create your new chart.

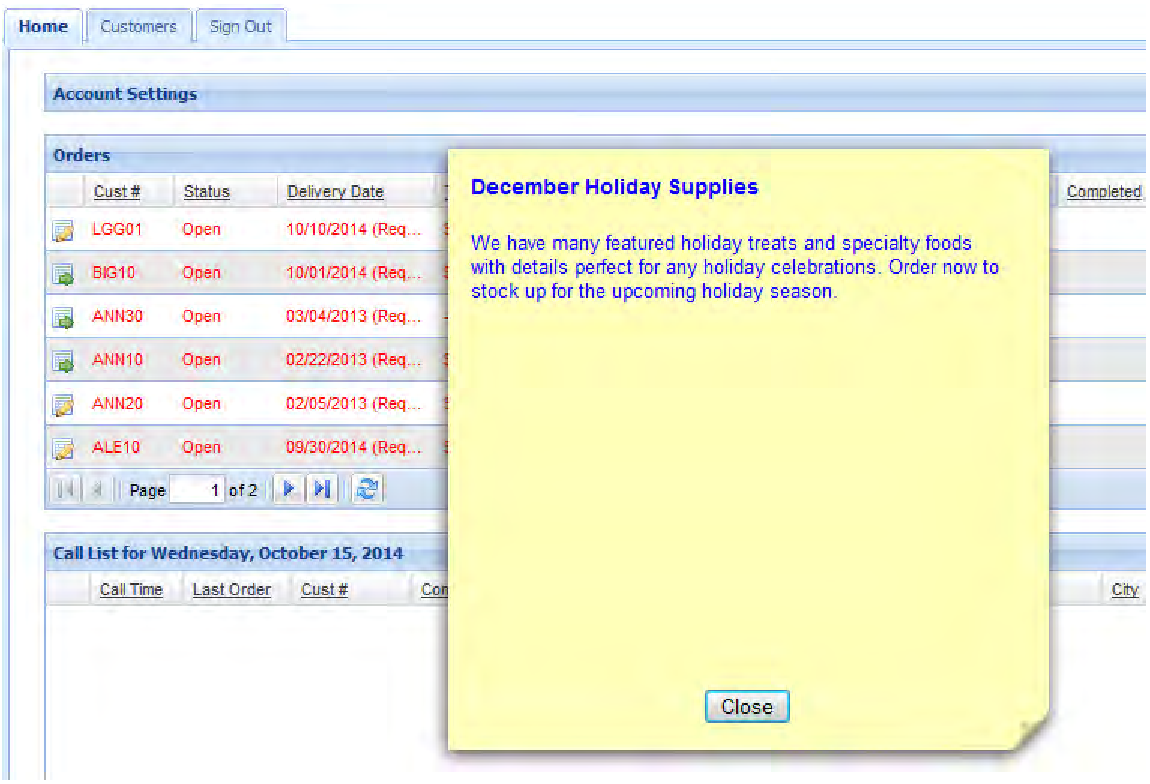


3.5 Messages

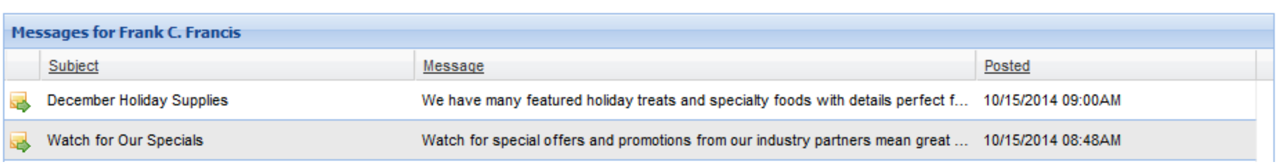
Staying in close contact with your company is important in today's fast paced business world. With the Messaging system built into **entrée.NET**, you will be kept in the loop with messages that will display as soon as you login.

The messages area is your "inbox". Here your company can send you information that you need to be aware of. When you are sent a message a bright yellow pop-up window appears. After you read the message, click the "**Close**" button.

Example An example of the yellow pop-up message box that will be displayed when you login to **entrée.NET**.



- The same message after it is displayed will be stored in your **Message** area.


Messages for Frank C. Francis

	Subject	Message	Posted
	December Holiday Supplies	We have many featured holiday treats and specialty foods with details perfect f...	10/15/2014 09:00AM
	Watch for Our Specials	Watch for special offers and promotions from our industry partners mean great ...	10/15/2014 08:48AM

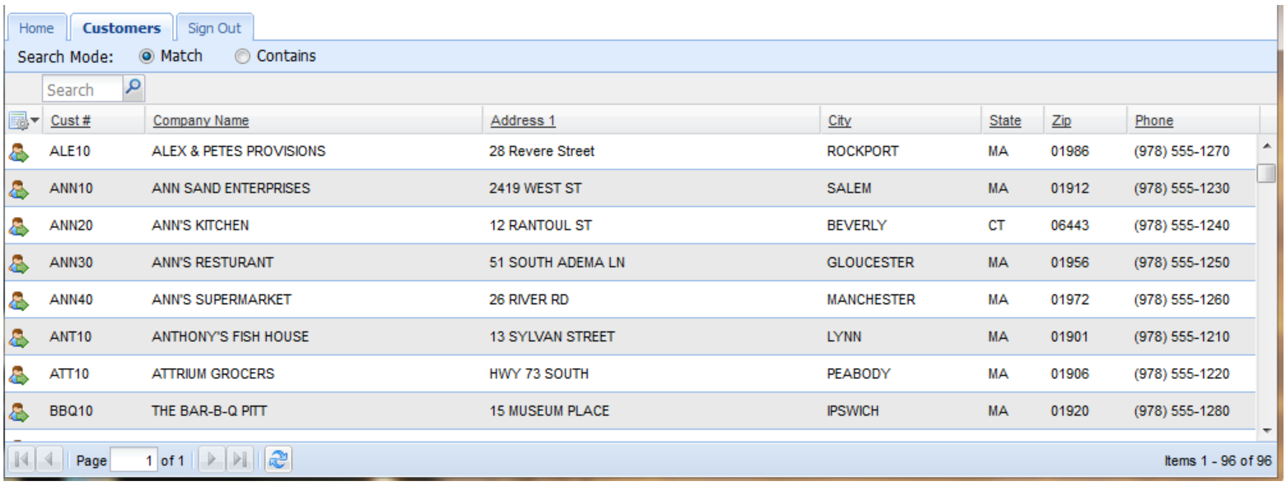
- There are four columns in the **Message** area.
  - **Open** column - This column does not contain a heading, but you will see the **View Message** button for each message listed. Clicking on this button will open the message for you to read.
  - **Subject** column - This column displays the subject of the message.
  - **Message** column - This column shows the first sentence or two of the actual content of the message.
  - **Posted** column - This column will show the date we posted the message for you to read.

Chapter 4

Customers Tab

4 Customers Tab

When you click on the **Customers** tab your **entrée** customer list is displayed. The customer number and main account information is shown. You can sort the customer file using any of the underlined column headings in ascending or descending order.



- Click the tools icon to view the drop down menu to add or remove columns from your display. Check the box to add a column and remove the check to delete a column from the grid.

- Column width can be modified by clicking and dragging the right or left column border in the headings section.
- Search for a specific customer by typing a word or letters in the Search box. Then select your **Search Mode** either Match or Contains.

- Click the search icon to get your search results.

- To add new customers to the list or update existing customer information use **Customer File Maintenance** in the main **entrée** system.

- **Support for "One Ship" Customer Configurations -** Addresses for customers setup with a "One Ship" address on the "Bill To / Ship" tab of Customer File Maintenance will show the correct shipping address in **entrée.NET** and requires **entrée** version 3.6.9 or later.

Accessing Customer's Accounts

After selecting your customer from the list in the **Customers** tab you will want to access their account information.

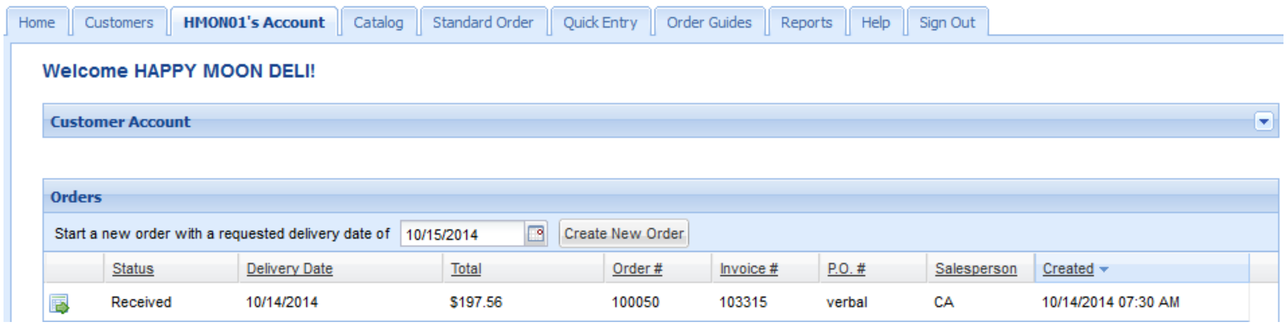
- Click the **Load Customer** icon to view that customer's account information.

Chapter 5

Account Tab

5 Account Tab

Once the customer's account is loaded you will see a series of new tabs across the top of the screen. Each of these tabs represents a section of our system where you will have similar features grouped together.



- You can show/hide this area by clicking anywhere on the **Customer Account** bar.

Customer's Account Tab

Once you select a customer the first new tab displayed combines the **entrée** "customer number" and the word "Account". In the example above the tab name is "HMON01's Account."

This chapter will explain the Customer Account, Orders, Account Overview, Messages, Address and Delivery Days sections on this screen.

Customer Account

The **Customer Account** area allows you to change/edit the following settings:

- **Username**
- **Password**
- **Email**

5.1 Orders

Creating a New Order

The **Orders** area is designed to show you the status of the orders you or the customer have entered with our system. You can also choose to create a new order for your customer here.

If you would like to begin a new order, simply enter the **Requested Delivery Date**.

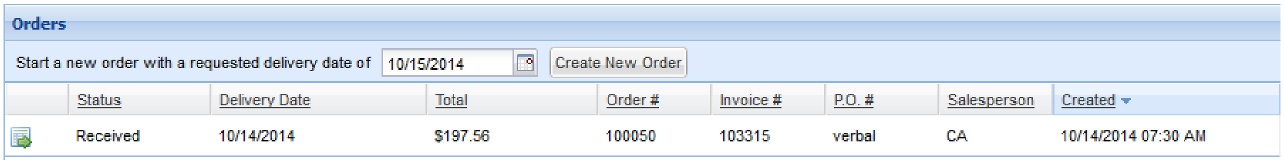
Then click the **Create New Order** button. 

You can also use the calendar tool  to select the delivery date.

This is just one of several ways you can begin a new order.

Status of Existing Orders

The main purpose of the **Orders** area is to list all your customer's recent and outstanding orders, so that you can check the status of each of them. There are nine columns in this area.



The following is an explanation of each:

- **Edit/View** column - This column does not have a heading; it will show the **Edit** / **View order** icon.
  - If the order's status is "**Open**," you will be allowed to **Edit** the order because it has not been received into our system yet.
  - All other possible status settings will only allow you to **View** the order because the order has already been received into our system and is getting ready to be picked and delivered to the customer.

- **Status** column - The Status column will show you one of four possible status settings:

  - **Open:** The order has not yet been completed and transmitted to us. You can open and further edit orders with this status.
  - **Pending:** The order has been completed by you or the customer and is waiting to be picked up by us. An order number has been assigned to this order.
  - **Transmitted:** The order has sent to us, but it has not yet been confirmed.
  - **Received:** The order has been officially received into our computer system and we have been able to assign an invoice number to it.

- **Delivery Date** column - This column will show the date you can expect the order to be delivered to your customer. The date shown here first will be your "Requested" delivery date. However, once the order is in the "Received" status, you will see the actual date of delivery. Note that factors such as the time we received the order, holidays, etc. can affect the actual delivery date.

- **Total** column - This column will show you the total amount of the order. Note that until the order has been officially "Received" by us, the total shown will only be estimated, designated with "(Est)" next to the amount. Once we have received it, our computer system will calculate the actual invoice total and show it in this column. Many factors can affect the invoice total including catch weights, sale items expiring, inventory shortages on our side, item substitutions, fuel, and delivery surcharges, etc.

- **.NET Order #** column - This column will show you the order number that the online system has assigned to this order. This order number is used to track online orders only.

Note The "invoice number," which corresponds to the unique number on the invoice document you receive when we deliver your items, will get assigned after the order has been "Received" by us.

- **Invoice #** column - This column will show the number assigned by our main computer system for this order. It is the same number that will appear on the invoice document that you will receive when your items are delivered to you.

- **P.O. #** column - If you assign a Purchase Order (P.O.) number to your orders, it will be displayed here. This number you provide, to track your purchases.

- **Salesperson** column - The salesperson column will show the name of the salesperson at our company who is assigned to your account and is responsible for this order being properly delivered to you.

- **Created** column - This column will show the date and time you created this order.

5.2 Account Overview

This area will list the customer invoice balances. You will be able to see a breakdown of any moneys due, discounts we've given, payment information, and more.

Account Overview - Open Balance: $4,365.34

Inv Date	Inv No	Stat	Inv Amt	Payment	Cred/Disc	Net Due	Bal Fwd	Last Pmt	Ref No	Scan
01-09-2010	868748	NE	$43.45	$0.00	$0.00	$43.45	$43.45			
01-16-2010	945922	NE	$2,581.97	$2,581.97	$0.00	$0.00	$43.45	01-16-2010	3452	
01-16-2010	946545	NE	$2,960.47	$2,960.47	$0.00	$0.00	$43.45	01-16-2010	3452	

The top of this area will show you the total "Open Balance" dollar amount. Below this, you'll see a breakdown of each of the orders, so you can see how we arrive at the open balance due. This area has eleven columns. The following is an explanation of each:

- **Inv Date** column - This column will show the "Invoice Date" (usually corresponds with the delivery date) of the order. You have the ability to sort the information in this area (ascending or descending order) by this date, by clicking on the column heading.

- **Inv No** column - Shows you the "Invoice Number" that was assigned to the order.

- **Stat** column - Shows the status of the invoice. Possible status values are:

  - **NE** (Non Extended): This means the invoice has not been finalized by us, and the items are most likely just being picked in our warehouse and loaded onto a delivery truck for you.
  - **CM** (Credit Memo): This is a Credit Memo, and reflects a credit on your account.
  - **OP** (Over Payment): This is an overpayment you made, and reflects a credit on your account.
  - **BC** (Bounced Check): This represents a payment that did not have enough funds in your bank to cover.
  - **FC** (Finance Charge): This represents finance charges that have been added to your account because of older invoices not being paid.
  - **CF** (Bounced Check Fee): Your check to pay an invoice was returned by your bank for insufficient funds. The amount listed here is the amount due us to cover bank fees.

- **Inv Amt** column - This column will show the total invoice amount of the order.

- **Payment** column - This column will list the total amount of payments you have made to this invoice.

- **Cred/Disc** column - This column will show the total of any credits or discounts that we have applied to this invoice.

- **Net Due** column - This column shows the current due on this invoice, after payments, credits, and discounts have been applied.

- **Bal Fwd** column - This is a unique column as it shows a running “Balance Forward” due. It is calculated line by line from invoice amounts due, payments credits, etc. The ending balance forward amount (from the last invoice on the list), will be the same as the current “Open Balance” shown in the top of this area.

- **Last Pmt** column - This column will show the date of the Last Payment for this invoice that we have received from you.

- **Ref No** column - This column will show you a Reference Number for this invoice. Most commonly it is the last check number used by you to make a payment on this invoice.

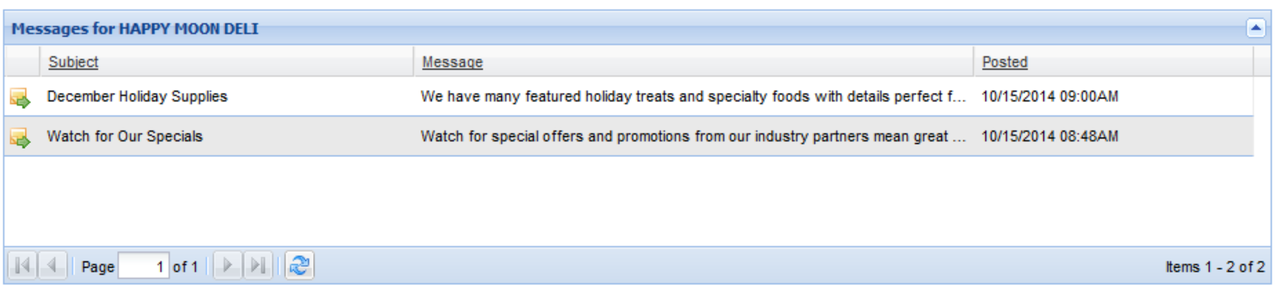
- **Scan** column - We have the ability to scan the signed invoices when it is returned to our office by our driver.

  If the scan exists, you will see the scan icon, which you can click. You will see a PDF image of the actual printed invoices with signature, etc. Note that there is a report you can generate which will also show you the scanned invoices. Refer to the Chapter on **Reports** for more information on viewing more than one scanned invoice at a time.

5.3 Messages

The messages area is your customer's “inbox” for correspondence from our company. Here we will provide the customer with important information that they need to be aware of.

The customer message area works the same as your message area. When customers are first sent a message, they will see a bright yellow pop-up window appear, with our message. This message window appears immediately after they sign in.



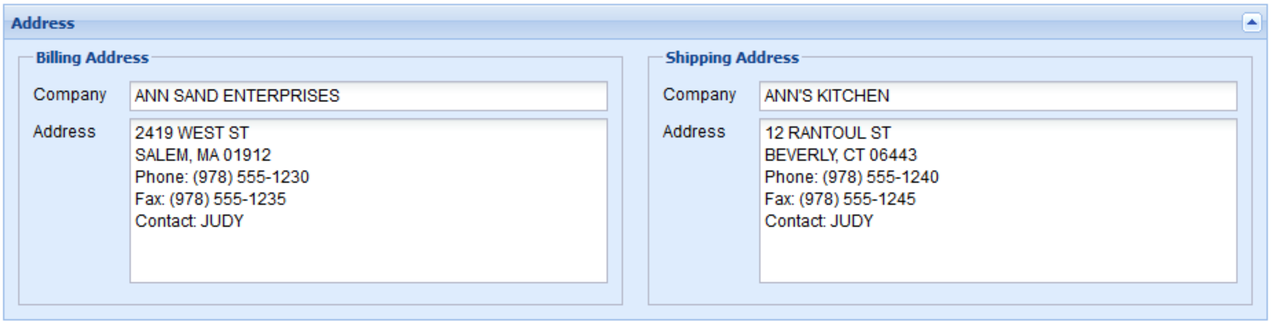
Note Closing the message does **not** erase it. The message is saved and you can view it here in the **Message** area.

There are four columns in the **Message** area.

- **Open** column - This column does not contain a heading, but you will see the View Message button for each message listed. Clicking on this button will open the message for you to read.
- **Subject** column - This column displays the subject of the message.
- **Message** column - This column shows the first sentence or two of the actual content of the message.
- **Posted** column - This column will show the date the message was posted.

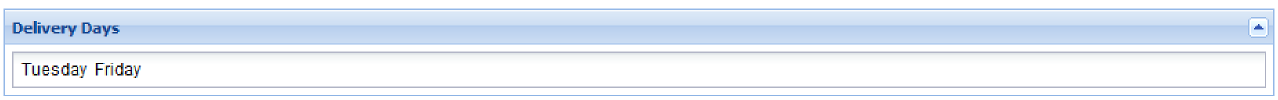
5.4 Address

This area will show you the Billing Address and Shipping Address we have listed for that customer account in the main **entrée** system. These addresses can only be updated in Customer Maintenance of the main **entrée** system.



5.5 Delivery Days

This area shows you the days of the week that you can schedule deliveries to the customer. When choosing a **"Requested Delivery Date**" for an order, it should fall on one of these days.



5.6 Creating an Account

How to Create an entrée.NET Account

When a customer requests access to our **entrée.NET** system you will need to create an account and assign a username and initial password. (Your System Administrator controls the settings that give you permission to create customer accounts.)

Once customers have this information they can login and submit orders and run reports at their convenience. Or you can place their orders for them if a customer does not want an account. Follow these simple steps to create your customer accounts:

1. Click on the **Customer** tab.

2. Use the **Search** tool to find the customer requesting an **entrée.NET** account.

3. Click the Load Customer icon  to view the customer's account information.

4. Click in the **Customer Account** section.

5. Click the **Create Account** button. 

6. The Account Creation Wizard displays the Customer Account Setup dialog box.

7. Enter a **Username** and **Password** for your customer in the Account section.

8. In the **Email Address** section enter the email addresses where your customer wants to receive their account setup information and order confirmation emails.

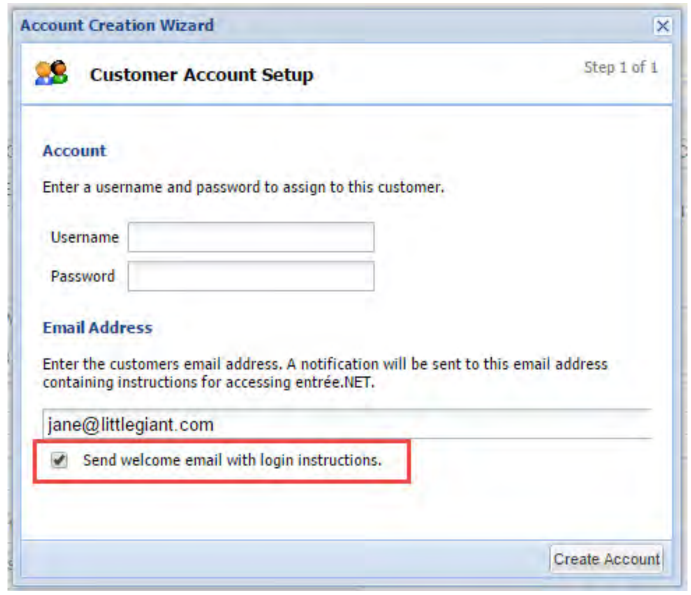
- **Send welcome email with login instructions -** Leave this option unchecked if you do not want an email sent to the customer.

* For Salespeople to use this feature the System Administrator must have the Settings tab, Salespeople **Option #14**, Allow Salespeople to setup **entrée.NET** accounts for customers, checked. If it is not enabled for salespeople you will not see this feature.

9. Click the second **Create Account** button. 

10. Now a **Customer Account Setup** email will be automatically sent to your customer's email address.

    Multiple email addresses can be entered for the customer by separating each email addresses with a semi colon.



11. The customer's **entrée.NET Account** section will look like the image here with a blank **Password** field after account creation.

Example Customers will receive an email like this with their login information and the link to your website login page.

Thank you for joining the entree.NET online order entry system!

To access the system please click the link below, or copy and
paste it into your web browser:

http://net3.necs.com/**YourFoodCompany**

When you reach the login page, please enter the username and password assigned to your account:

Your username is: happy
Your password is: happy

Please save this information for future reference.

Thank you again for using the entree.NET system!

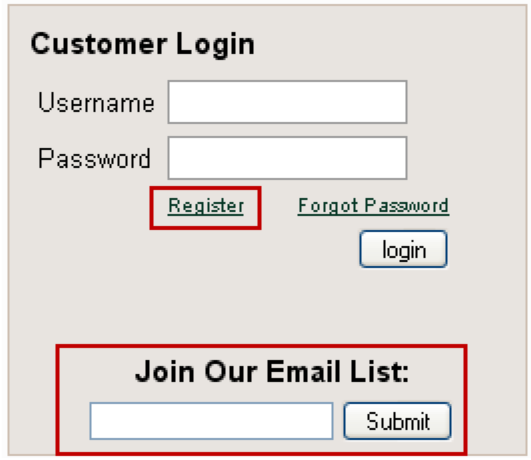
*** Please do not reply to this email, as the address ***
*** it was sent from does not accept incoming mail. ***

5.7 Customer Passwords

Forgotten Passwords

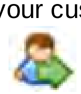
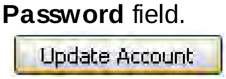
Both salespersons and your customers have the ability to use an automated process to reset your own passwords through our website. Just go to our website click the **Forgot Password** link. Then enter your username in the password reset dialog.

- The website Home page customer login area with the **Forgot Password** link.
- Click **Forgot Password** and this action will trigger an email sent to your account email address.
- This email will contain a temporary password and link to the password reset page.
- There you will enter the username, temporary password and the new password here. If all the information has been entered correctly, the password will be reset in **entrée.NET**.



Resetting a Customer Password

There will be occasions when your customer has lost their password and the password reset procedure did not work for them for some reason. There is no way to find out what their old password was, so you will need to create a new temporary password for them. Follow these steps to create the temporary password:

1. Click on the **Customer** tab.
2. Use the **Search** tool to find your customer.
3. Click the load customer icon  to view the customer's account information.
4. Go to the **entrée.NET Account** section. Once you have created the customer's account the **Password** field will be blank (shown in Creating an Account step 11.)
5. Type a new password in the blank **Password** field.
6. Click the **Update Account** button. 

7. Now contact your customer by email or phone with their new temporary password.

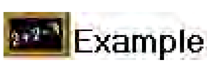
Password Automatic Reset Process

For distributors who do not have the entree.NET website module a "Forgot Password" button has been added to the login screen which allows customers and salespeople to initiate an automatic password reset procedure.

1. The user will enter their username in the password reset dialog box and click the **Reset Password** button.

2. This action will trigger the **Password Reset** confirmation dialog box click **OK.**

3. Now an email will be sent to their account email address. This email will contain a temporary password and link to the password reset page. The customer will enter their username, temporary password and their new password here. If all the information has been entered correctly, their password will be reset in the **entrée.NET** system.



Sample email message text:

You have requested to reset your account password. In order to do so we have provided you with temporary password for your account.

Your temporary password is: rm4zuth2

Please follow the link below to complete the password reset: http://yourNET.com.

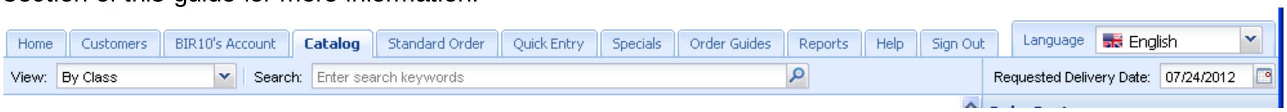
Chapter 6

Catalog Tab

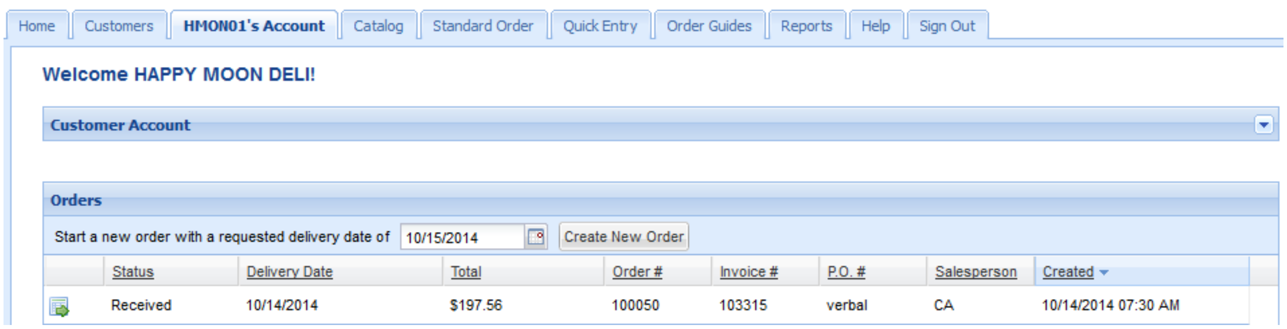
6 Catalog Tab

Once you have selected a customer account to work with, your menu tabs will change. All the menu tabs related to creating and managing your customer's order will be added to your menu. These are the same screens your customers would use for their online ordering. Use the **View** drop down menu to select how you want to see our catalog displayed. Select from **All Items**, **By Class**, **By Brand** and **Item Tags**.

In **entrée.NET** version 3.3.7 the option to add a Language Translator Service was added to the software. The **Language Tab** on the right displays when your company activates this service. See the **Language Tab** section of this guide for more information.



The customer's **Account** information tab will have the "customer number" on the tab as shown in the example below.



The **Catalog** tab displays our full catalog of products available for you to order. This is a useful tool if you want to locate items to purchase and you want our full catalog to search.

Item Searches

To help you find items, use the "Search" feature at the top of the screen. You can change how the search will work by hitting the drop down arrow in the Search area. The Search normally defaults to "Item Description," but you can also search by "Class," "Brand," or "Item Number."

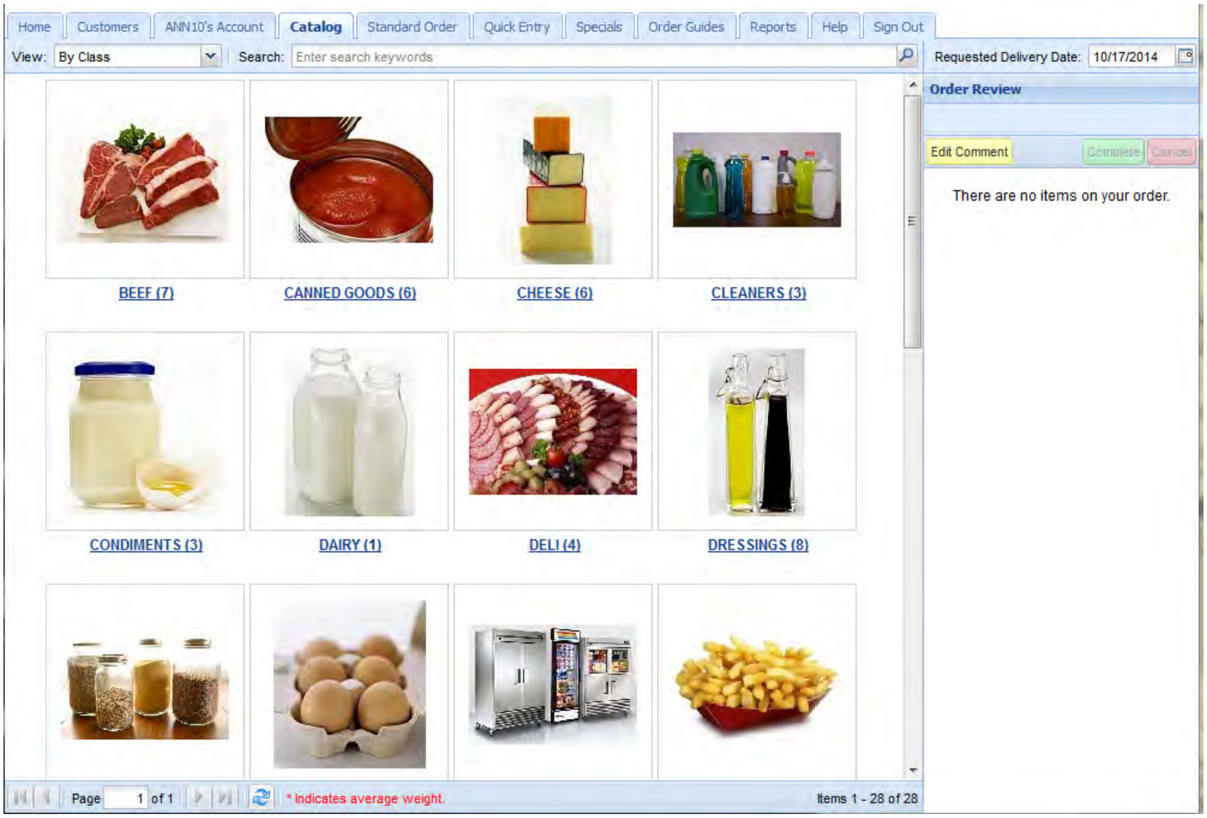
To search, enter the text of what you are looking for in the keyword area. The keyword area accepts full or partial words.

Next hit the **Enter** key or click the magnifying glass  to begin the search.

By Class

When selecting the **Catalog** tab, you will first see a list of all of our product "Classes." These Classes represent how we have grouped similar items together and will help you find items. You will notice that there are numbers in parentheses next to each Class name. These numbers represent the number of items in that class. When you click on a specific class, then all of the items within that class will appear.

This is an example of the Catalog page viewed "By Class" with class images assigned in the main **entrée** system.

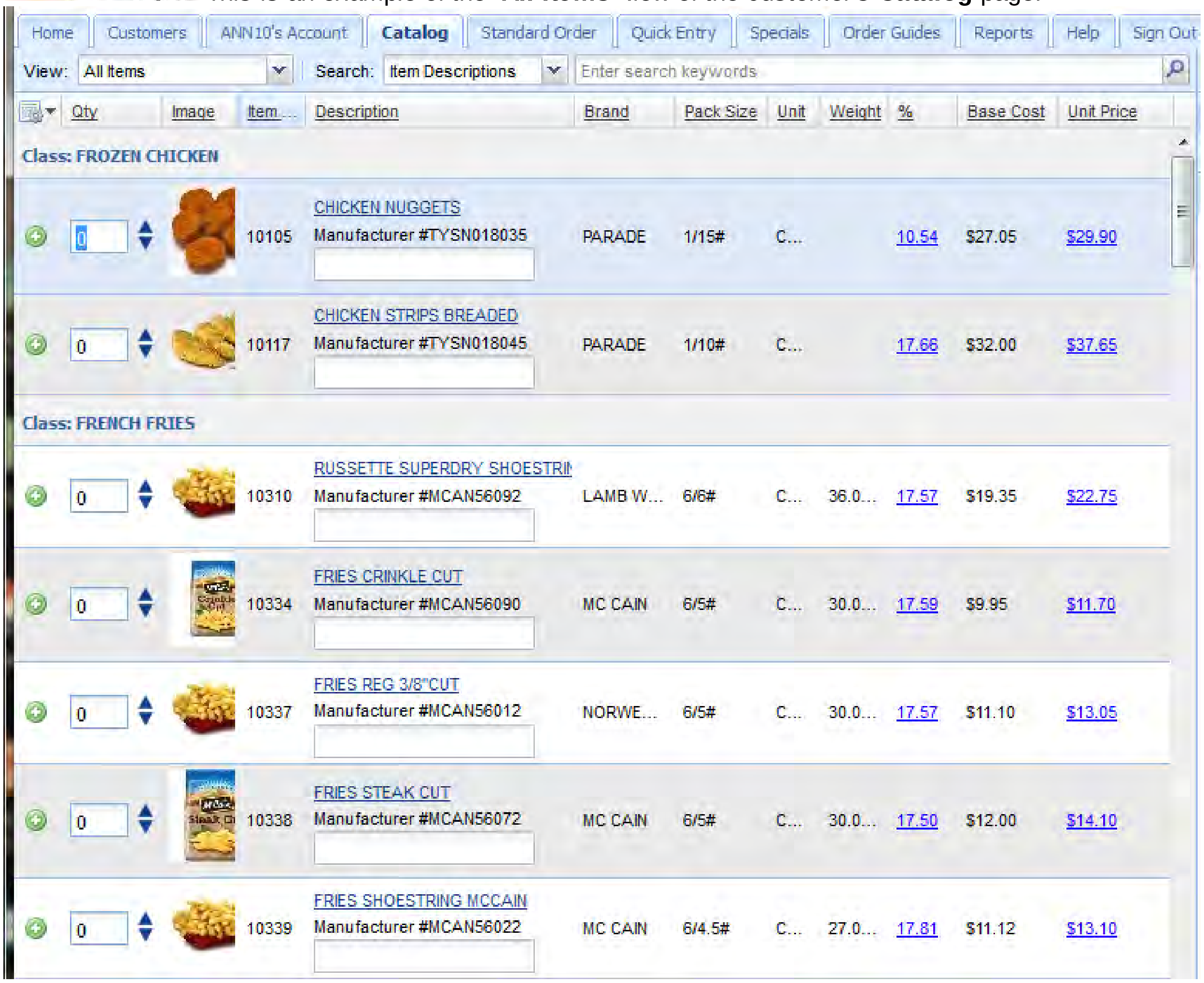


All Items

You also have the option to bypass the View **By Class** option and instead go directly into our complete product listing. To do this, hit the drop down arrow next to "**View**," and select **All Items**.

- When "**All Items**" is selected, our complete product listing will begin to display, sorted by **Class**.
- When the new "**Item #**" column is selected in the **Catalog** screen it will list all products by **Item #** and disable the grouping by **Class** and **Brand** as it sorts in the selected direction.

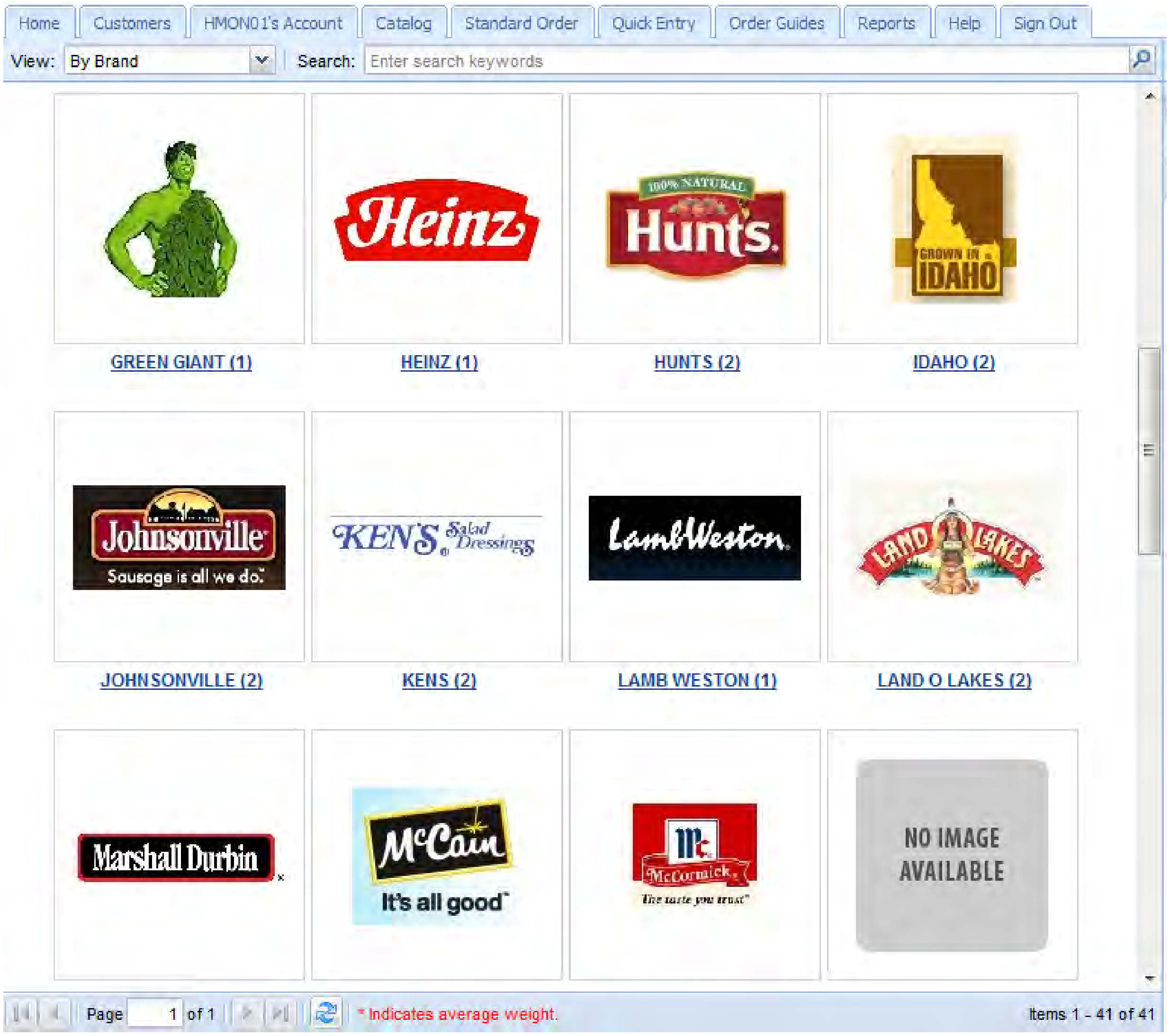
Example This is an example of the "**All Items**" view of the customer's **Catalog** page.



You will notice that you can enter quantities on this screen for each product you would like to order. Simply enter the quantity required by typing in the number or using the up/down arrow keys next to each item to increase/decrease your ordered amount. As items are ordered, they will automatically appear in the shopping cart on the right of the screen.

By Brand

Select “**By Brand**” from the **View** drop down menu to view our current Brands. The numbers in parentheses next to each Brand name represent the number of items for that brand in our catalog.



Featured Brand

You may see **Brand** images displayed in the lower section of the Shopping Cart area, these are our "Featured Brands".

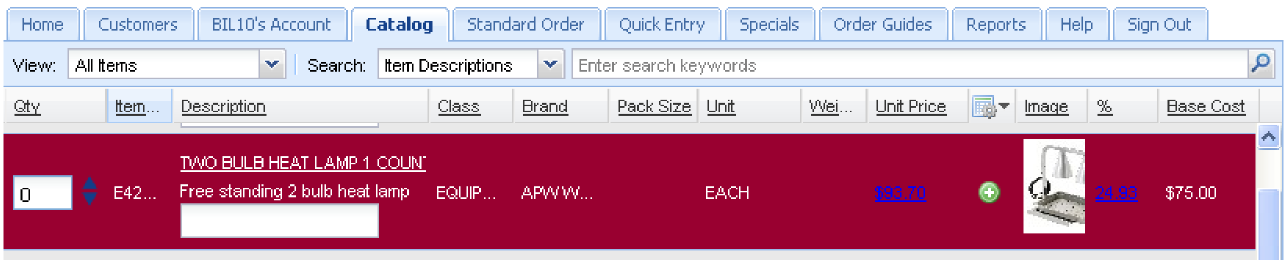
If you click the green **Shop Now** link the catalog page will display all the items for that brand in our catalog.

If you mouse over the brand image the slide controls will display so you can view all our Featured Brands at your own pace.

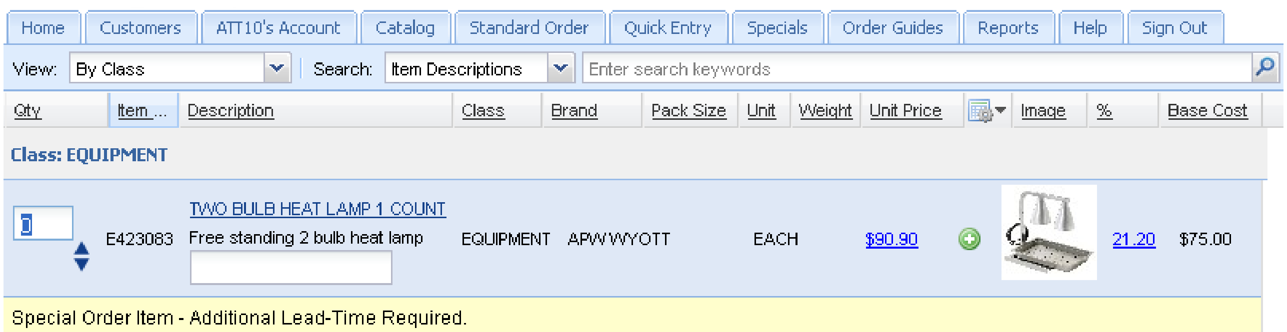
Support for Special Order Items

Special Order Items are items that are not regularly carried in your warehouse. These items must be handled differently and may require deposits upon order. Additional time is also needed for the item to be delivered to you and then the customer. A **Special Order Items** check box on the **Misc 1** tab in **entrée Inventory File Maintenance** is where you would designate the item as Special Order. These items will also be exported to **entrée.NET** and **Electronic Order Pad** for display in your product catalog.

When you are logged in and working with **Special Order Items** in **entrée.NET** and **Electronic Order Pad** they will be displayed in your product **Catalog** tab screen with a red background color first.



Then after selecting the item the background for the item turns blue with a yellow **Special Order Item** message below it as seen here (requires **entrée** 3.6.7 or later).



Support for Dot Foods Items

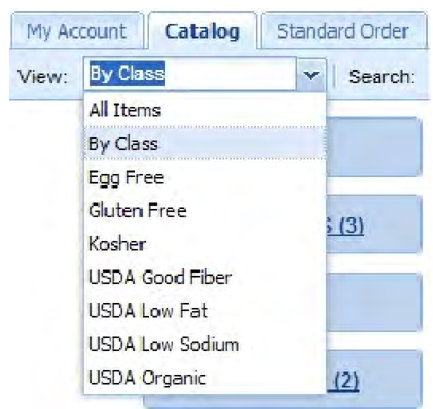
If you have the **entrée.DOT** application for DOT Foods products you can see row color coding on DOT "Special Order" and "Drop Ship" items during the order entry process. These items will appear in the catalog with an orange background color for "Special Order" items and a brown background color for "Drop Ship" items.

Note The System Administrator must have the "**Show DOT special order items**" and "*Show DOT dropship items*" set to "**Yes**" in the **Settings** for **entrée.NET** for this feature to work. This feature is *only* available for Salespeople and will *not* be applied to the catalog for customers.

6.1 Item Tags in the Catalog

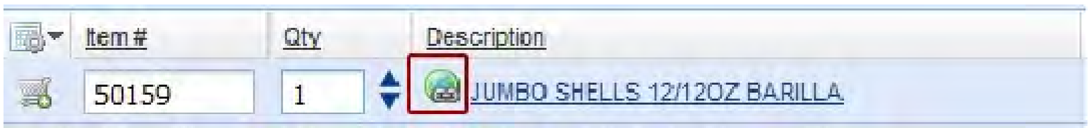
You now have an additional way to find products for your customer's orders by using the **Item Tags** that have been assigned to items in our inventory. **Item Tags** like Dairy Free, Egg Free, Peanut Free, Gluten Free, Kosher, USDA Low Fat, USDA Organic, USDA Good Fiber, and USDA Low Sodium may have been assigned to the products in our catalog. To find a list of our currently active **Item Tags** check the **View** drop down list in the **Catalog** tab.

- To use **Item Tags** to filter your view of the product catalog just select the specific item tag from the **View** drop down list.
- Now only the items that have been assigned to that item tag will be displayed in the **Catalog** page. Select the items and quantities you want to add to the order and follow the normal order procedure as detailed in this guide.

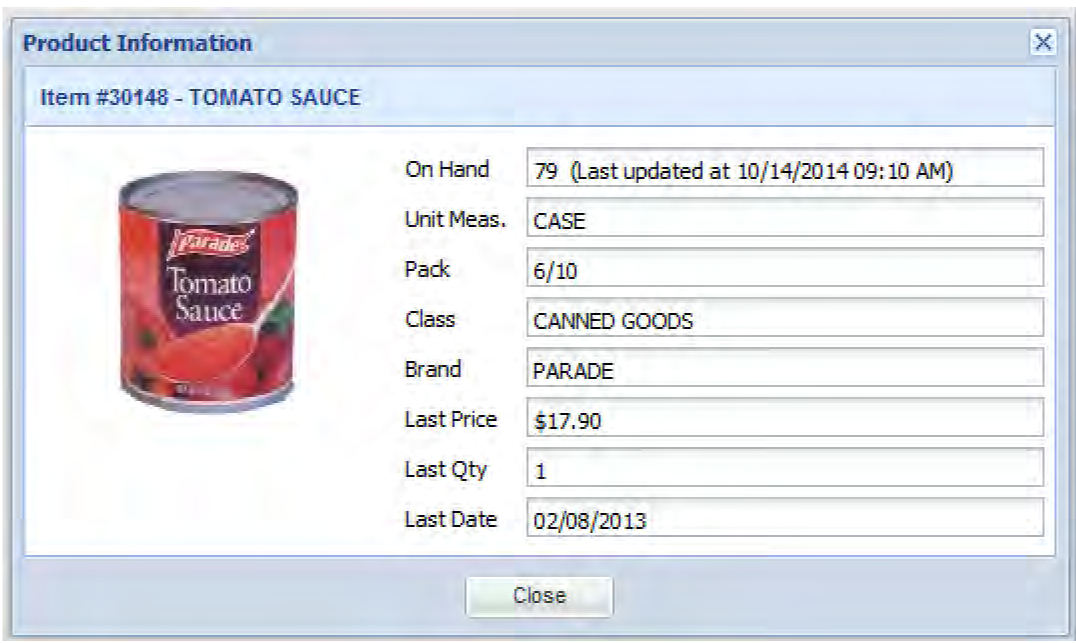


6.2 Product Information and Weblinks

- The **Description** column in the item detail grid will display an icon indicating if a "Weblink" is available for the item. A **Weblink** is a link to an external website to provide additional information about a product. Click on the **Weblink** icon to open the external link in a new window of your browser.

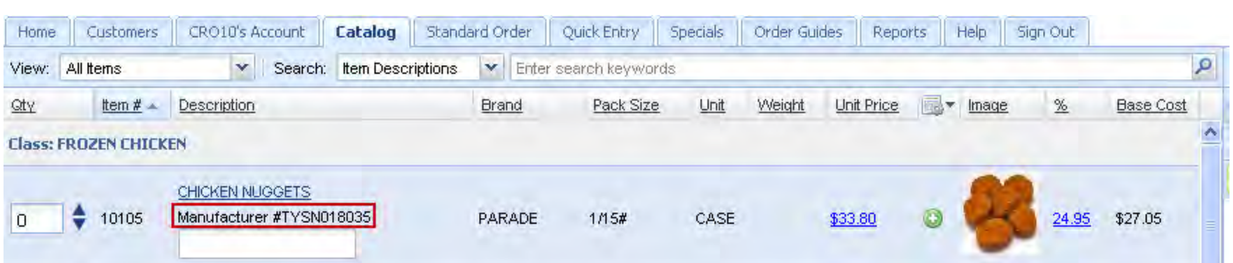


- If you click on the blue item **Description** link the Product Information dialog box will display. You will see the Weblink listed with the other information about the item.



- If the "**Display Manufacturer Item # beneath Item description**" option has been set to "**Yes**" by the System Administrator the **Catalog** screen will display the manufacturer item number below item description line 1.

- The **Manufacturer Item #** must be defined for the item in Inventory Maintenance in the main **entrée** system to be displayed (requires **entrée** version 3.6.7 or later).



Chapter 7

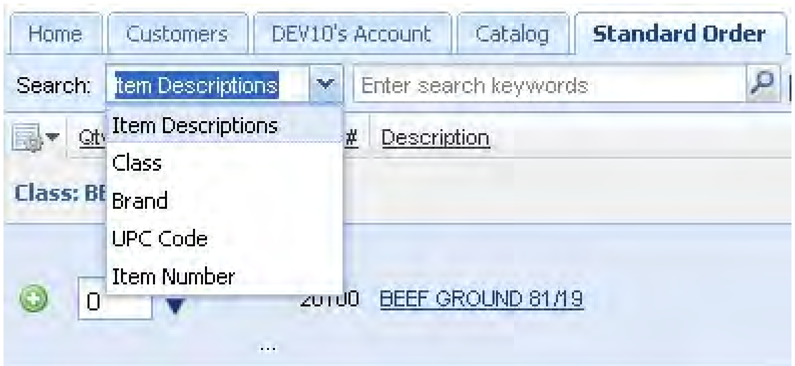
Standard Order Tab

7 Standard Order Tab

The **Standard Order** tab will display all the items your customers have ordered from us in the past. This includes items customers have ordered via this online system, as well as items customer service or sales have entered for our customers.

You can define **Order Guides** geared to each customer's business requirements. This gives you more control and flexibility in the ordering process. Please refer to the **Order Guides Tab** chapter in this document for more detailed information.

The **Search** drop down list is used in Standard Order and Quick Entry.

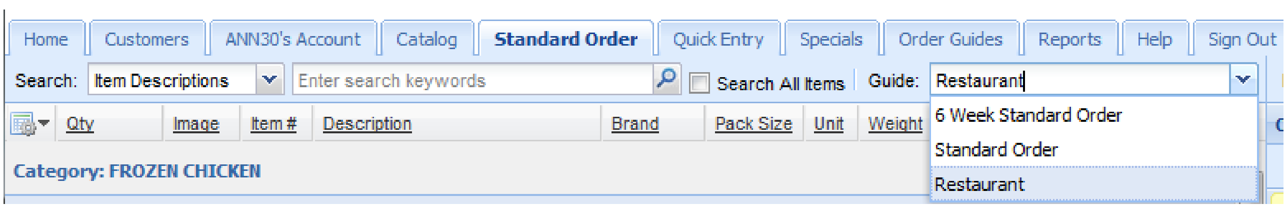


The **Guide** drop down list.

The **Standard Order** guide is the only guide you do not have to create.

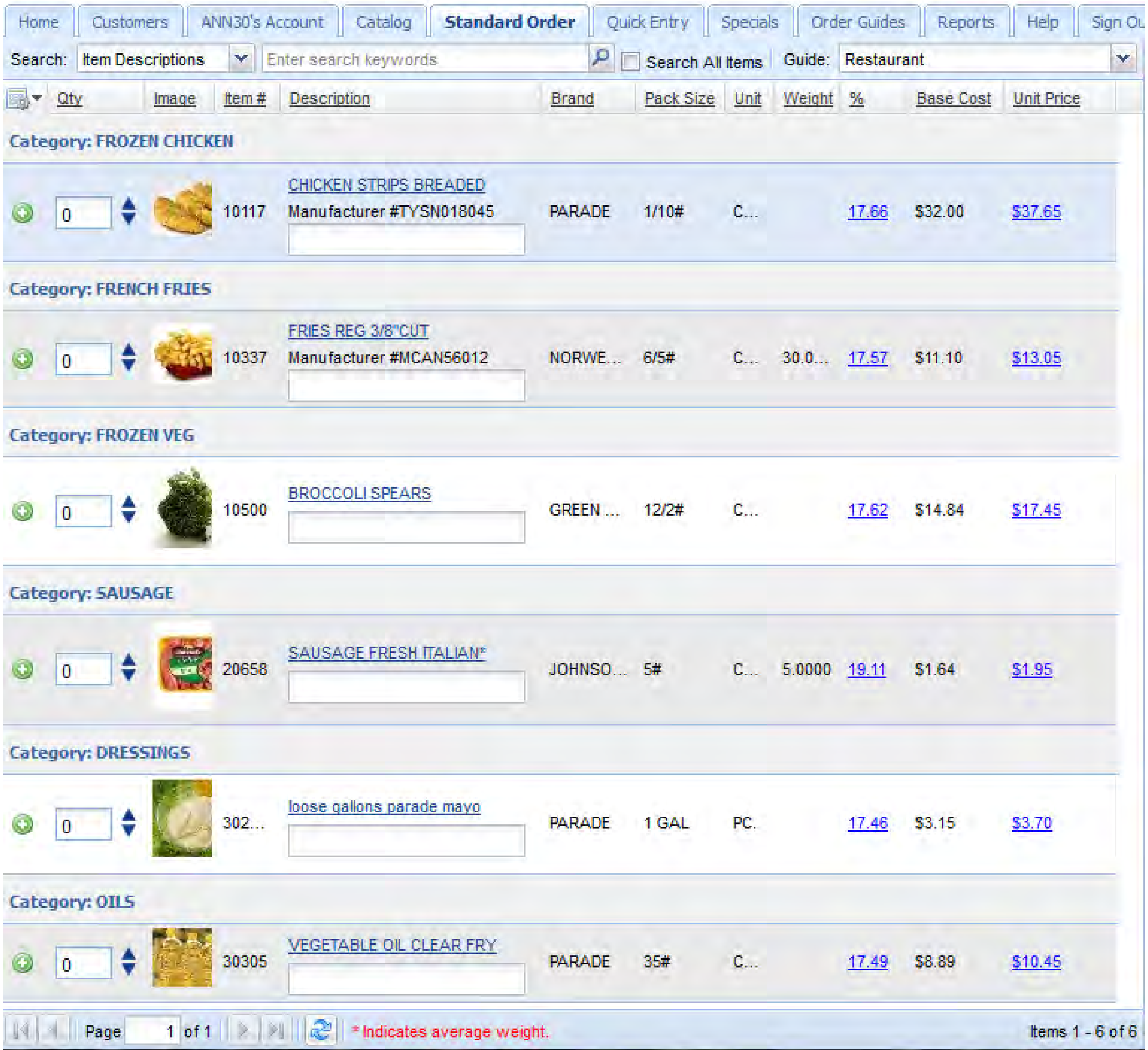
Date Filtered Standard Order

The **Standard Order** tab with the date filtered "**X** week Standard Order" option visible in the **Guide** drop down menu. This feature allows you to view a copy of your customer's "Standard Order" showing only items that you have been purchased in the last "**X**" weeks. Where "**X**" is the number of weeks selected in **Account Settings** for the Date Filtered Standard Order option.



The items which appear on the **Standard Order** list are normally sorted by our product “class” and then our item number. Note that if your customers would like their items displayed in a specific order, you can set this up for them in **Order Guides**.

Example A customer's Standard Order screen with item images turned on by the System Administrator.



Product Searches

To help you find items in your **Standard Order**, use the "Search" feature at the top of the screen. You can change how the search will work by hitting the drop down arrow in the Search area. The Search normally defaults to "Item Description", but you can also search by "Class", "Brand", "UPC Code" or "Item Number."

- To search, enter the text for what you are looking for in the keyword area. The keyword area accepts full or partial words. Next hit the **Enter** key or click the magnifying glass icon to begin the search.
- If you would like to search for items outside of your **Standard Order**, be sure to check the "**Search All Items**" box.

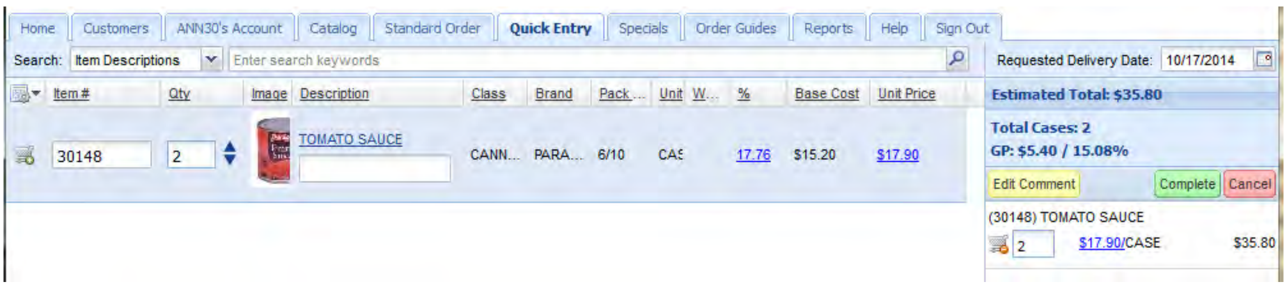
Chapter 8

Quick Entry Tab

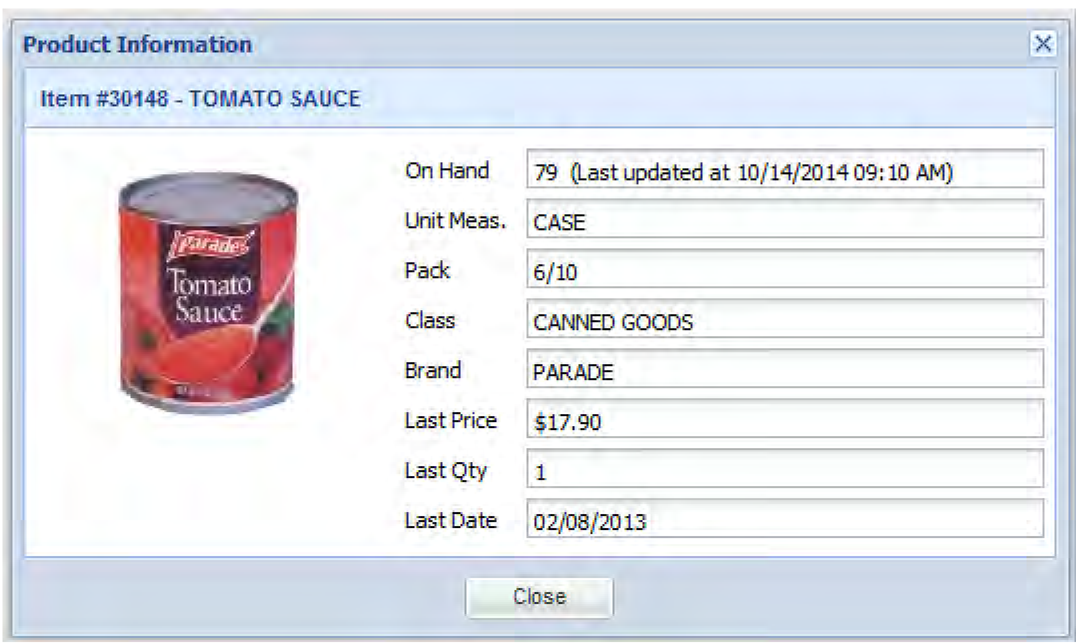
8 Quick Entry Tab

The **Quick Entry** tab was created for salespeople who want to quickly enter an order and know the item numbers.

- When selecting this tab, you will be prompted for the item number and a quantity.
- Just type the item number and hit the **enter** key. The item's description will appear to confirm you have the correct item.
- Next type the quantity and hit the **enter** key. You have the option to use your mouse to adjust the quantity with the up/down arrow keys.



Example An example of the customer's Quick Entry screen and shopping cart. When you click on the **blue product link** in the **Description** column the product information pop-up box is displayed.



Product Searches

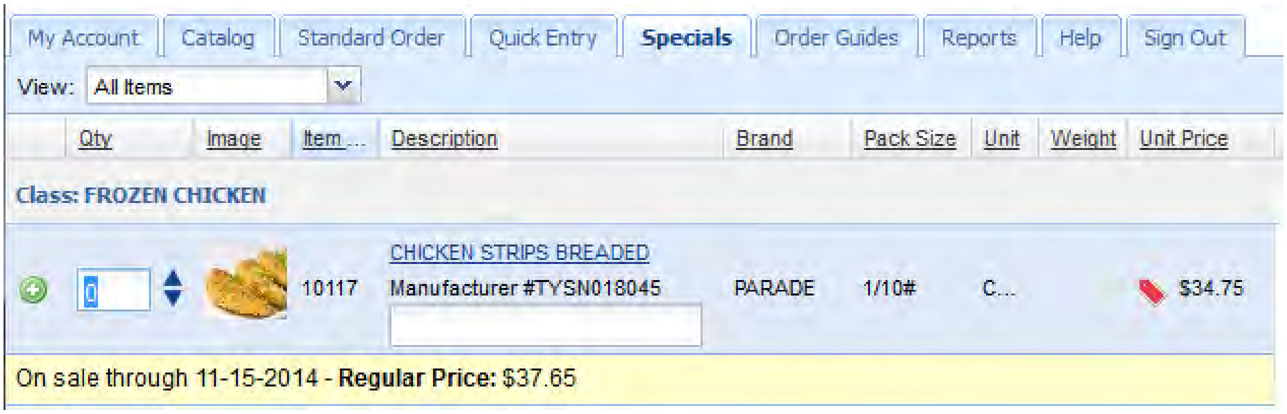
You can change how the search will works by hitting the drop down arrow in the Search area to choose from "Item Description", "Class", "Brand", "UPC Code" or "Item Number."

Chapter 9

Specials Tab

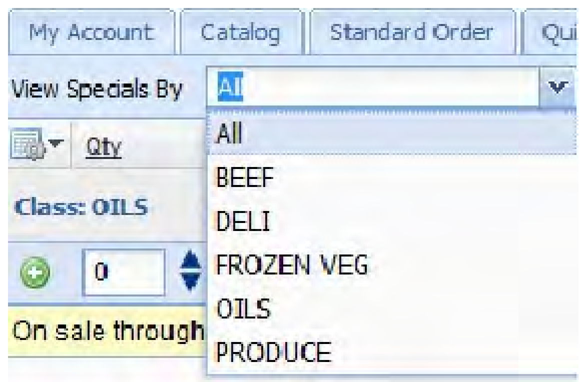
9 Specials Tab

Everyone loves a special and we do our best so you can offer special pricing on a regular basis. When selecting the **Specials** tab, you will be able to view and order our posted specials for your customers.



The **Specials** tab will provide you multiple ways to view them by hitting the drop down arrow next to "View Specials By" section. You can select to view by "All" or by product "Class."

Note The "All" option will display every sale item in our system that has sale pricing.



Important Notes

- Special sale items have expiration dates. The **"Requested Delivery Date"** you define will have an impact on the specials that you view here. Please be sure to request a date closest to the current date to see our active specials, as we update this info on a weekly basis.

- We may send customers and our sales staff an email every time we update our specials. Be sure to look out for these emails in your in-box.

Chapter 10

Order Guides Tab

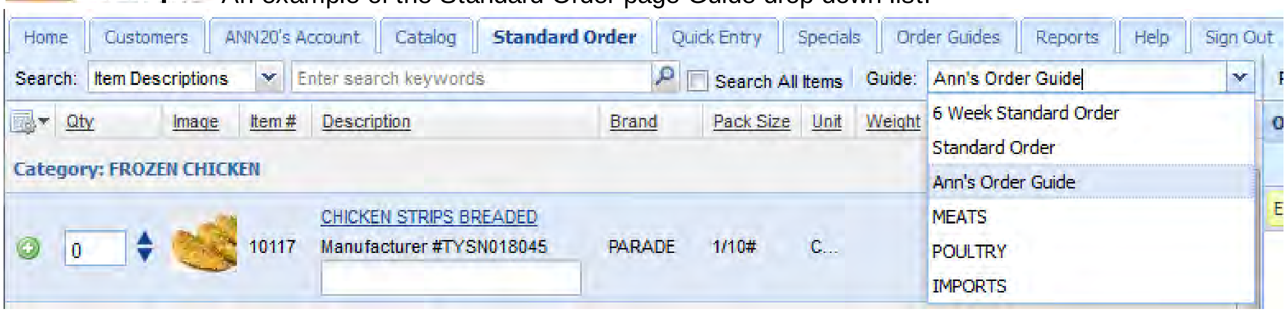
10 Order Guides Tab

The **Order Guides** tab allows you to define and edit targeted lists of items. Order guides can be created for and geared to specific customer's business needs. Using order guides will make the ordering process easier and faster. For each order guide you define, you can select specific items and the order in which they will appear when placing an order. If you deal with different delivery locations, you can also define order guides which are specific to those locations which we call "Ship To" accounts.

The new "Import from Standard Order" process will copy all items from a customers "Standard Order" into the custom order guide. Once the items from the Standard Order are imported, the salesperson or customer may continue to add, remove, and adjust the sequence of items in the new custom order guide. This process will be discussed in detail later in this chapter.

You can select an **Order Guide** to be used when placing an order, on the **Standard Order** tab by selecting it from the "Guide" drop down menu.

Example An example of the Standard Order page Guide drop down list.



Possible Uses for Order Guides

- To provide targeted product lists by Department; i.e. frozen foods, dry goods, canned goods, dairy, meat, seasonal, etc…

- To align a product list to meet the requirements of different business units; ethnic markets, convenience stores, varying restaurants menus, coffee stores, chain stores, fast food, fine dining, etc…

- Create guides for each of your customer's business locations.

- To limit the item selection to match your product line.

- Makes transferring the item ordering task to the customer problem free.

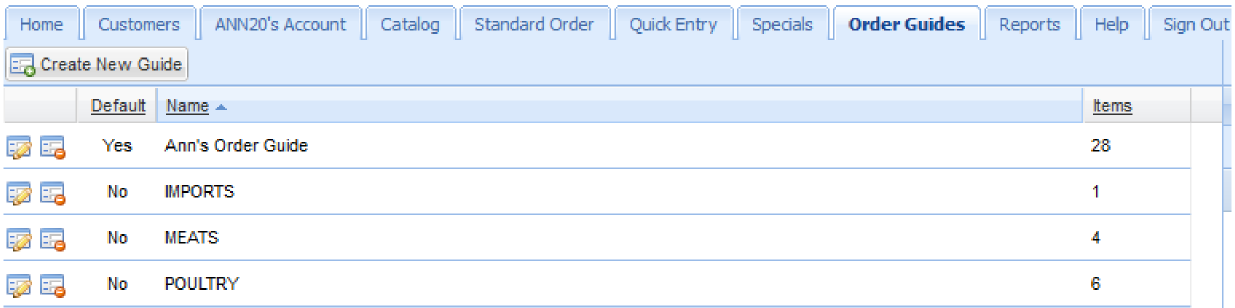
- Once created, your Order Guides can be edited or deleted using the tools in the **Order Guides** page.

10.1 Creating an Order Guide

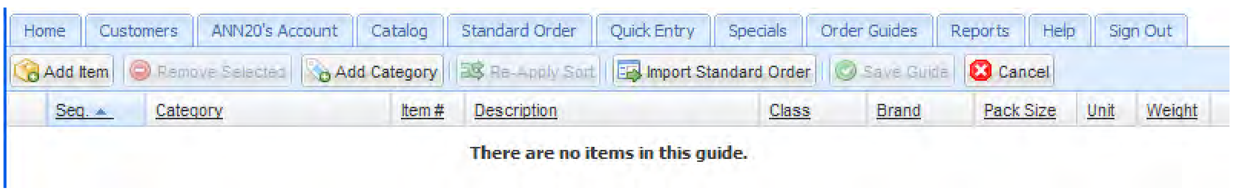
1. Click the **Order Guides** menu tab.

2. Click the **Create New Guide** button. 

The **Order Guides** page displays your current customer's order guides, indicates the Default for Standard Order and the number of items in each guide.

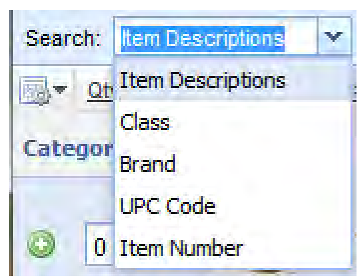


3. Click the **Add Item** button to begin adding items to the new Order Guide.



4. The **Item Search** dialog box will display.

   Use the **Search** drop down list and select Item Descriptions, Class, Brand, or Item Numbers fields to target your keyword searches.



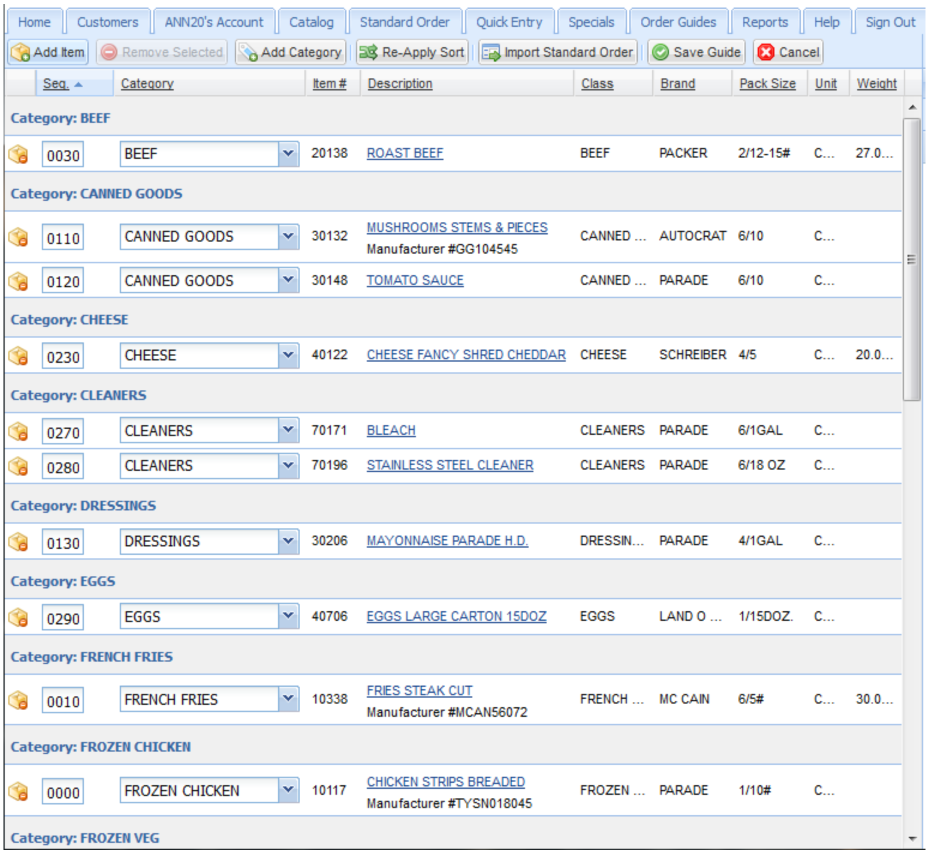
5. Enter a keyword in the search box then click the **Search** button.

6. When you find an item for your Order Guide, click the green plus icon to add the item to the Order Guide.

7. Continue your search until you have added all the desired items to the new Order Guide.

8. You can use any of the underlined column headings in the **Order Guide** page menu to sort the item list in ascending or descending order.

9. You can change the order in which items appear via the **SEQ** column. This column allows you to enter a number, representing the sequence in which this item should appear on the order guide you are defining.



9. Review the items in the new order guide list. You can create your own categories to organize your items within the new Order Guide or select “Use Item Class” from the **Category** drop down list.

10. To remove an item from the Order Guide item list on the page click the **Remove Item** icon  in the left column or select the item and click the **Remove Selected** button above.

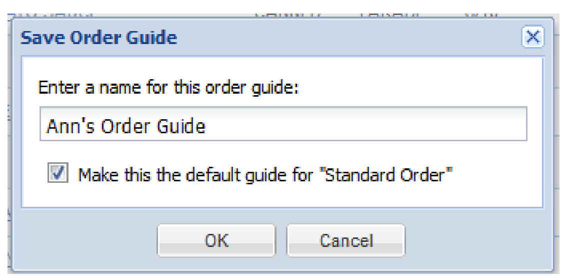
12. If you do not want to create the new Order Guide now click the **Cancel** button.

13. Once your Order Guide editing is done click the **Save Guide** button.

14. Now the **Save Order Guide** dialog box will display.

15. **Enter a name for this order guide**.

16. Check the box for "**Make this the default guide for "Standard Order"** if you would like this order guide to be the customer's default for Standard Order.



17. Click **OK**.

18. Click the **Order Guides** tab.

19. You will now see your new order guide listed in the **Order Guides** main page with the total number of items and **Default** value for the Order Guide.

Add a New Category to an Order Guide

1. When you are editing an order guide click the **Add Category** button.

2. The **Add New Category** dialog box will display as shown below.

3. Type a name for your new category in the text box.

4. Click **Add** to add a new category or **Cancel** to cancel the new category. Adding a new category called “Cheese” to the “dairy list” order guide.

5. A category can be assigned to any item by using the drop down list in the Category column for that item. The **Category** “CHEESE” displayed for an item in the “DAIRY” order guide.

10.2 Edit / Delete Order Guides

1. Click the **Order Guides** menu tab.

2. Your current order guides will be listed by name with the total number of items in each guide as displayed in the image above.

3. Click the **Edit Order Guide**  button on the left to add or delete items or to rename the Order Guide.

4. To remove an item from the Order Guide item list click the **Remove Item** icon  in the left column or select the item and click the **Remove Selected** button in the tool bar.

5. Use the **Delete Order Guide**  button on the left to remove the selected Order Guide completely from your system.

10.3 Importing Standard Order into Order Guides

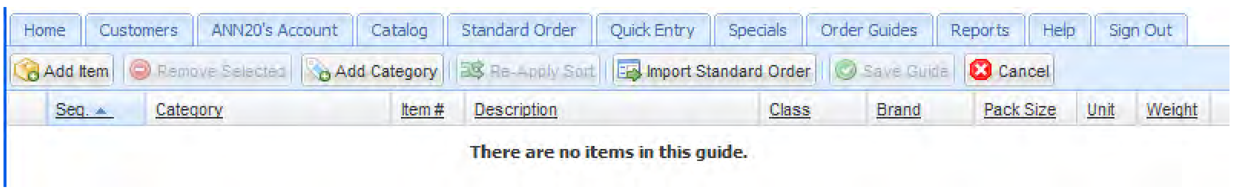
1. Select the desired customer from the Customers menu tab.

2. Click the **Order Guides** menu tab.

3. Click the 

Create New Guide button. Notice that the Import Standard Order button is now in the tool bar.

4. Click the **Import Standard Order** button.



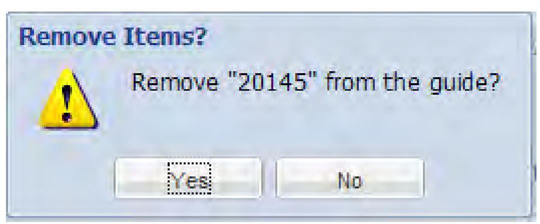
5. The **Import Standard Order?** confirmation dialog box will display "This will import all items from your 'Standard Order'.". Click **Yes** to continue.

6. The items from the customer's Standard Order will now be loaded into the **Order Guides** page.

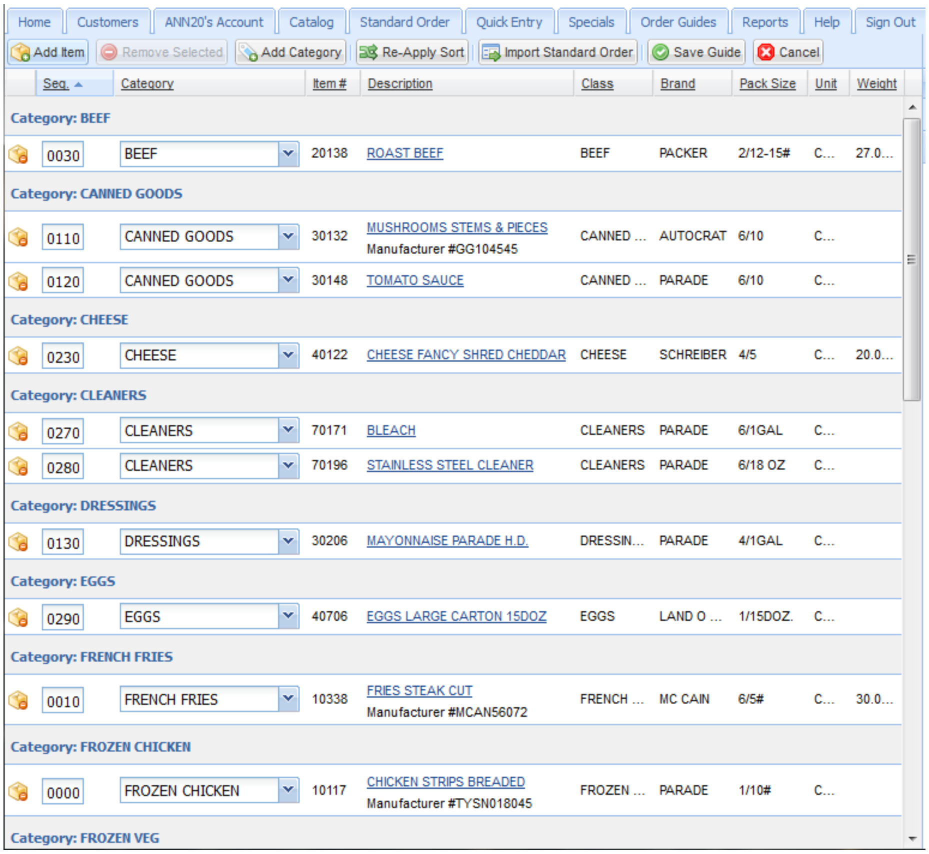
7. Use the buttons in the tool bar to edit, add new items or categories, and reorganize the Order Guide list as needed.

8. Click the **Remove Item**  icon in the leftmost column to delete individual items from the list or select the item and click the **Remove Selected** button.

9. As you select each item to remove the **Remove Items?** confirmation dialog box will be displayed. Click **Yes** to continue the deletion.



10. Once your order guide editing is done you need to save the customer's new order guide, click the **Save Guide** button.

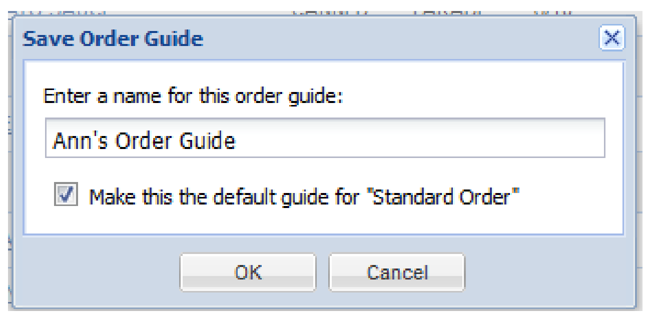


11. The **Save Order Guide** dialog box will display.

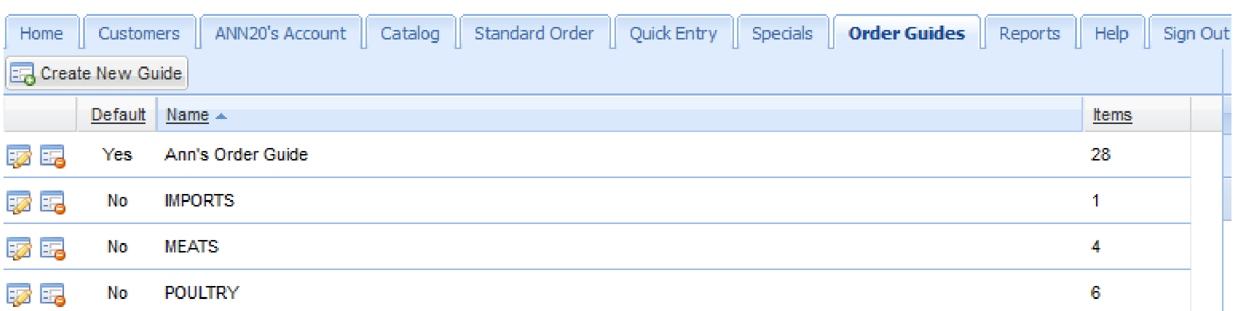
12. Enter a new name for this order guide.

13. Check the box for "**Make this the default guide for "Standard Order"** if you would like this order guide to be the customer's default for Standard Order.

14. Click **OK**.



15. In the image below in the **Name** column you can see the new custom order guide that was created for the **ANN20** account and was set as the **Default**.



10.4 Default Order Guide

A "Default Order Guide" feature that allows you to select an Order Guide to be loaded automatically when clicking on the "Standard Order" tab.

How to Set a Default Order Guide

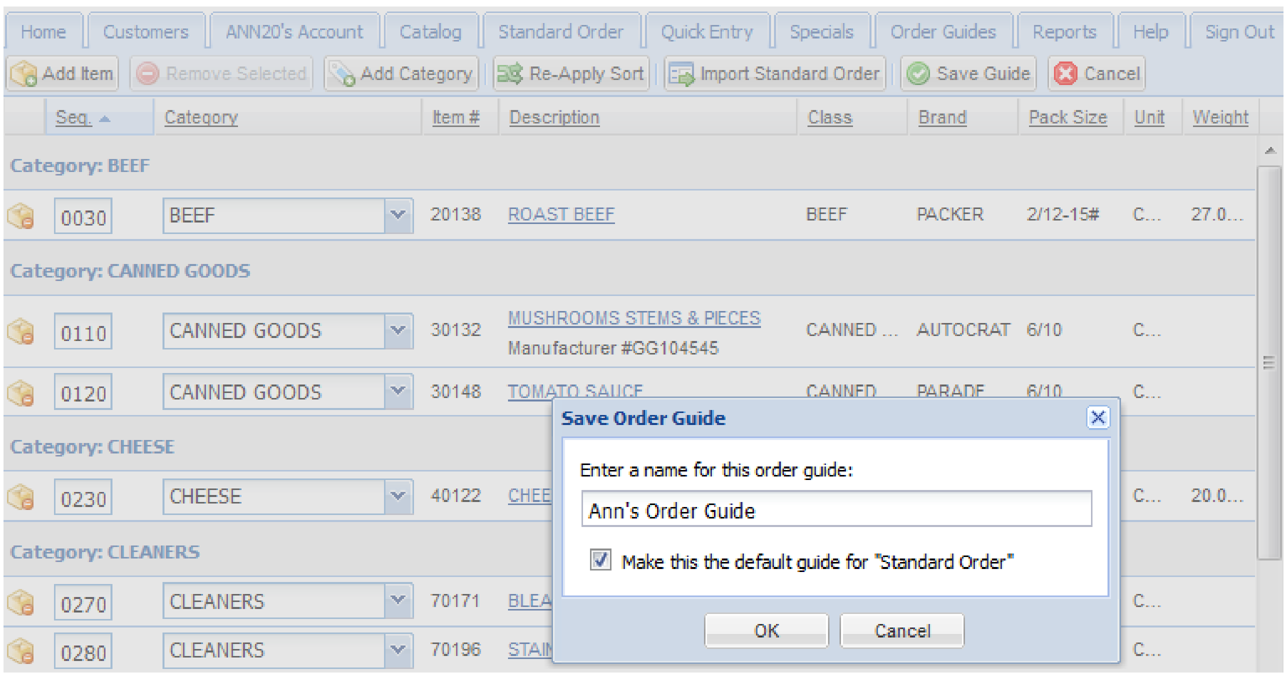
1. Create your custom Order Guide by following the steps in the **Creating an Order Guide** section of this chapter.

2. Click the **Save Guide** button. The **Save Order Guide** dialog box will display.

3. Give your Order Guide a name. In this example we used "Ann's Order Guide".

4. Check the box for "**Make this the default guide for "Standard Order".** Click **OK.**

5. Now this Order Guide will automatically load into the **Standard Order** page when you login to our system.



Chapter 11

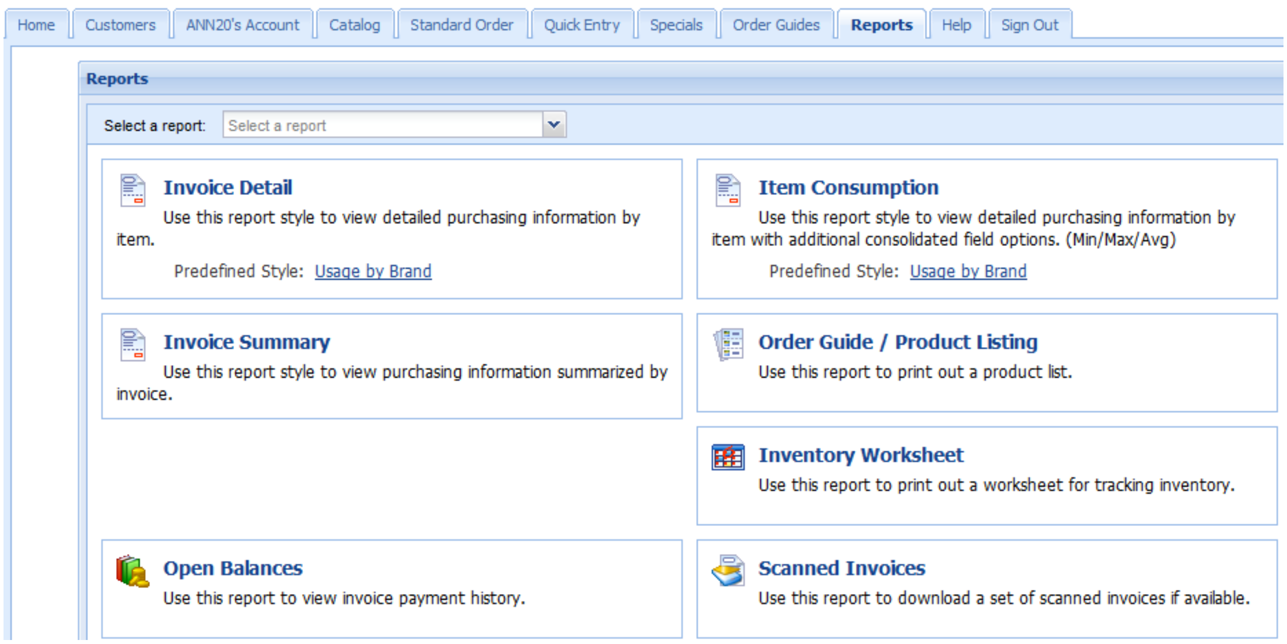
Reports Tab Customer

11 Reports Tab Customer

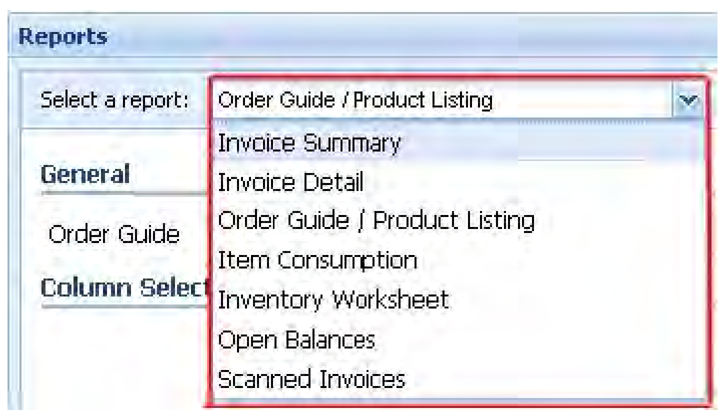
The easy to use **Reports** tab allows you to obtain important information about the purchases of your customers. You have complete control to customize and save the style of reports you prefer.

We provide you with 13 months of sales history to generate your reports as you monitor your business. Select the date range, select which columns you would like to see and in what order, choose filters, and select how the report sorts and subtotals.

When you select the **Reports** tab you will be presented with a list of the available reports and a short description.



You can access your reports via the main reports page link list or use the **Select a report** drop down menu. This drop down menu is available to you in all of your report generating and configuration pages.



Pre-defined Report Styles

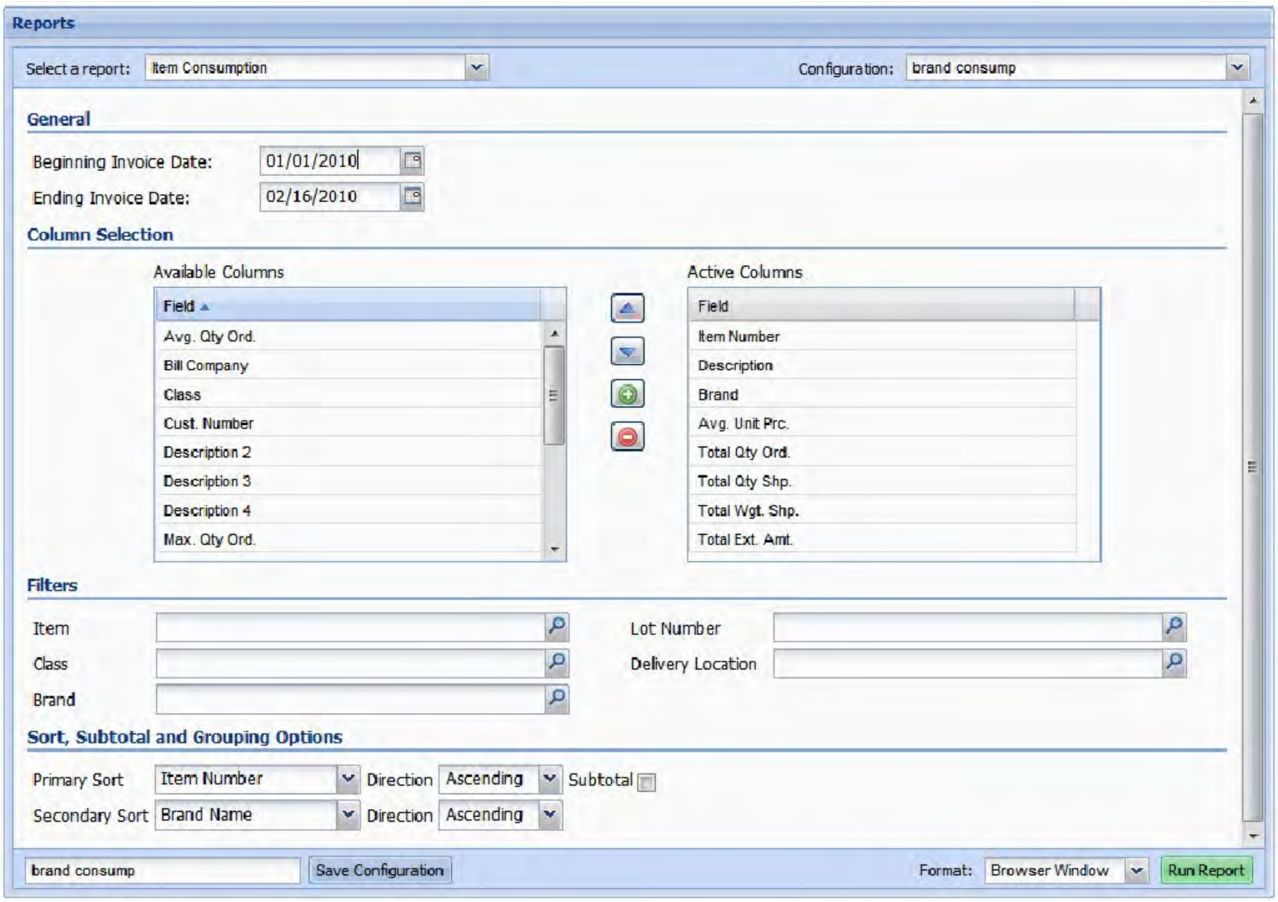
Since many of our customers like to see their purchase history by item brand we have included two pre-defined styles.

- **Invoice Detail** report with a pre-defined style of **Usage by Brand**.
- **Item Consumption** report with a pre-defined style of **Usage by Brand**.

11.1 Customizing Your Reports

The information displayed in your reports can be customized to suit your business requirements. You can create and save custom report configurations geared to your reporting style to make running periodic reports your way an easy and convenient process.

The image below is a customized Item Consumption report configuration called “brand consump”. Item Number was selected as the Primary Sort column and Brand Name for the Secondary Sort column. No Filters or Subtotals were used in this custom report configuration.



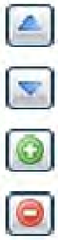
About Custom Report Generation

- **Select a report** using the drop down list and a saved custom report style from the **Configuration** drop down list.

- **Beginning Invoice Date** and **Ending Invoice Date** which can be set by using the calendar tool or by typing your dates into the box

- Each report has an **Available Columns** list and **Active Columns** list. The **Active Columns** list and will be the columns used in the final report.

Tools for column selection and customization:



Up and Down arrows to move a field and reorder the **Active Columns** list.
Click the field in the list and click the up or down arrow until the location is set.

Plus and Minus buttons to add or delete fields from the **Active Columns** list.
Click on a field then click the plus or minus button to update your list.
You can also drag and drop report columns using your mouse.

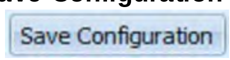
Filters

Reports can be filtered by Item, Class, Brand, Lot Number, and Delivery Location.

Sort, Subtotal and Grouping Options

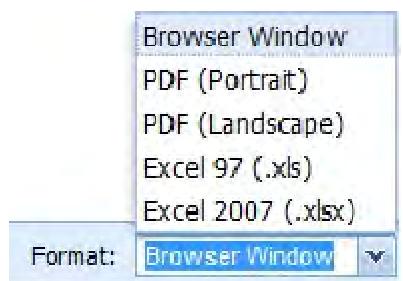
- Primary Sort and/or Secondary Sort fields in ascending or descending order.
- Sort by Invoice Date, Item Number, Brand Name, Class, Customer Name Delivery Location, or Sequence fields.
- Check the box to Subtotal by the Primary Sort field.
- Check the box to Group by the Primary Sort field.

How to Save a Custom Report Configuration

1. Create your customized report configuration using the column manipulation information detailed above.
2. Then type a name in the box next to **Save Configuration** at the bottom of the screen.
3. Click the **Save Configuration** button. 

4. The configuration name will now appear in the **Configuration** drop down list for that report in your **Reports** page.

5. You can specify how your report should be generated using the "**Format**" drop down list in the bottom right section of the **Reports** screen. The format options list for the report generation process.



- When report Format **Browser Window** is selected a new tab will open in your browser to display the report. If you would like to print the browser report, right click in the report page and select print from the browser menu.

- When report format **PDF** (portrait or landscape) is selected a new tab will open in your browser to display the PDF report. Use the icons in the Adobe Reader tool bar of the window to save a copy on your computer, print or email the report.

- When report format **Excel** (97 or 2007) is selected a new tab will open in your browser.
  a. If you do not have the Excel software loaded on your computer you will need the Excel Reader. Click the link provided on the page to download the Excel Reader before proceeding.
  b. The Excel report link will appear in the lower right corner of your browser window.
  c. Click the link and the report will open in the Excel Reader.
  d. Use the Excel menu to print the report and save a copy on your computer.

6. Once the report configuration and format is set, click **Run Report.** 

11.2 Reports Samples

Scanned Invoices Report

We have the ability to scan the signed invoices when our driver returns from making a delivery. If this data is available, you can view and print all of a customer's scanned invoices from the last 13 months. You no longer have to wait for someone to search, print and send the requested invoices.

Madison Distributors

168 Boston Post Rd Madison CT, 01902 (203) 555-9000

INVOICE

SOLD TO:
ANN ENTERPRISES
24 WEST ST
SALEM, CT 01912
ANN
(203) 555-1230

SHIPPED TO:
ANN ENTERPRISES
24 WEST ST
SALEM, CT 01912

Customer No.	Salesperson	Route/Stop	Order Date	Delivery Date	Terms	Invoice No.
ANN10	GT		03/25/10	03/31/10	NET 7 DAYS	103235

LINE	ITEM NUMBER	QTY. ORDER	QTY. SHIP	UOM	DESCRIPTION	BILLING UNITS	UNIT PRICE	EXTEND AMOUNT
					** DRY ITEMS **			
1	30132	1	1	CASE	___MUSHROOMS STEMS & PIECES	1	37.75	37.75
						** Sub-Total ==>		37.75
					** REFRIGERATED ITEMS **			
2	20138	2	2	CASE	___ROAST BEEF MARQUE'S PREMIUM	0.00	15.00	0.00
3	40122	3	3	CASE	___CHEESE FANCY SHRED CHEDDAR	60.00	1.55	93.00
						** Sub-Total ==>		93.00

*** Payment Due by 04/07/10 ***

These are your outstanding invoices:

Inv. Date	Invoice #	Amount Due
04/02/09	103169	2,480.63
04/02/09	103193	1,906.28
04/02/09	103196	2,271.86

Total balance due: 6,658.77

Number of PCS.	6	Total WEIGHT	164.00	INVOICE TOTAL ($)	130.75

Customer's Signature: a. S. ________________________

Reports to Manage Customer Inventory

- You select what days to include in your worksheet. Displayed is an example of an Inventory Worksheet without a Saturday.

GIADES RISTORANTE
74 PLAINES RD
DES PLAINES, IL, 60016

Inventory Worksheet

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Item # / UOM	Description / Pack Size	Wed 01/20/2010		Thu 01/21/2010		Fri 01/22/2010		Sun 01/24/2010		Mon 01/25/2010		Tue 01/26/2010	
		Inv	Qty	Inv	Qty	Inv	Qty	Inv	Qty	Inv	Qty	Inv	Qty
20071 CASE	HAM VIRGINIA 2/12.75# ARMOUR 2/12.75#												
20073P PC.	HAM IMPORTED 3/12# CELEBRITY 6/12#												
20082 CASE	TURKEY BRST OIL BRN 2/9# RAEFORD 2/9#												
20099 CASE	PEPPERONI 4/3# MARGHERITA (CONNIES) 4/3#												
20116 CASE	ROAST BEEF SLICED 2/5# GRECO 2/5#												
20126 CASE	SAUSAGE PIZZA CONNIE'S 48# 1/48#												

- When you create custom order guides you can print each guide individually using this report.

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DES PLAINES, IL, 60016

Order Guide

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Seq.	Item Number	Description	Class	Brand	Unit MS.	Pack Size	Blank
ZZZ	10311	MILK WHOLE 1/GAL	02 DAIRY	DEANS	GAL.	4/1GAL	
ZZZ	10312	MILK 2% MILK 1/GAL	02 DAIRY	DEAN'S	GAL.	4/1GAL	
ZZZ	10322	MILK CHUGS 2% 24/8OZ DEANS	02 DAIRY	DEANS	CASE	24/8oz	
ZZZ	10324	MILK CHUGS CHOC. 24/8OZ DEANS	02 DAIRY	DEANS	CASE	24/8OZ	
ZZZ	10335	YOGURT,VANILLA 2/5# DEANS	02 DAIRY	DEANS	CASE	2/5#	
ZZZ	10344	BUTTERMILK 1/HG DEANS	02 DAIRY	DEANS	PC.	9/HG	
ZZZ	10383	CREAM CHEESE PHILLY 30# BULK	02 DAIRY	PHILLY	CASE	1/30#	
ZZZ	10397	SOUR CREAM CULTURED 5 LB	02 DAIRY	DEAN	PC.	4/5 LB	
ZZZ	10478	HEAVY WHIPPING CREAM QUART	02 DAIRY	DEAN	PC.	16/QUARTS	
ZZZ	10480	COTTAGE CHEESE 5# TUB	02 DAIRY	MEADOWBROOK	PC.	1/5#	
ZZZ	10483	SUPER 50 30# PAIL	02 DAIRY		CASE	1/30#	
ZZZ	10485	AERSOL WHIP 12/14 OZ	02 DAIRY	INSTANT WHIP	CASE	12/14 OZ	
ZZZ	10494	CREAM HEAVY 36% UHT 12/8OZ DAIRY FR	02 DAIRY	MORNINGSTAR	CASE	12/8OZ	

Reports to Manage Customer Purchases

- The Invoice Detail report can provide up to 13 months of detailed sales history information.

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DES PLAINES, IL, 60016

Invoice Detail
01/02/2009 through 01/21/2010

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Invoice Number	Invoice Date	Item Number	Description	Qty. Ordered	Qty. Shipped	Weight Shipped	Unit Price	Ext. Amount
837897	01/02/2009	50718	NORTHERN BEANS 6/10#	1.0000	1.0000	0.0000	17.62	17.62
837897	01/02/2009	70249	CATERING PAD 50CT	1.0000	0.0000	0.0000	19.50	0.00
837897	01/02/2009	70194	FOODBOAT 300 3LB. 500 CT. RED CHECK	1.0000	1.0000	0.0000	16.99	16.99
837897	01/02/2009	50349	TORTELACCI CHEESE 10# PERFECT PASTA	3.0000	3.0000	0.0000	22.50	67.50
837897	01/02/2009	390342	CHEDDAR SAUCE SHARP 6/10# CHEF-MATE	1.0000	1.0000	0.0000	66.56	66.56
837897	01/02/2009	20350	PORK NECK BONES 25# CASE	1.0000	1.0000	25.0000	0.69	0.69
123568	01/11/2010	50388	RAVIOLI CHEESE 5# FRZN PERFECT PAST	3.0000	3.0000	0.0000	13.00	39.00
123568	01/11/2010	39014	KETCHUP HEINZ 1000/9GM IND.	1.0000	1.0000	0.0000	23.99	23.99
123568	01/11/2010	38331	CROUTON HRTH BAK 8# GRL/HRB RED LAB	3.0000	3.0000	0.0000	16.14	48.42
123568	01/11/2010	50155	FETT.EGG NESTED #129 12/1 BARILLA	1.0000	1.0000	0.0000	32.19	32.19
123568	01/11/2010	20563	CALAMARI TUBES ONLY 4/2.5# PANAPESC	4.0000	4.0000	40.0000	2.49	99.60
123568	01/11/2010	50135B	PENNE RIGATE BULK #72 2/10# BARILLA	1.0000	1.0000	0.0000	19.49	19.49
123568	01/11/2010	50120B	CAPELLINI BULK #1 2/10# BARILLA	1.0000	1.0000	0.0000	19.49	19.49
123568	01/11/2010	50470	GRAHAM CRACKERS 27/4.7OZ NABISCO	1.0000	1.0000	0.0000	23.44	23.44
Total:								
				33627.7500	33495.5000	300309.0900		657,024.18

- The Invoice Summary report provides you with purchasing information summarized by invoice.

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DES PLAINES, IL, 60016

Invoice Summary
01/01/2010 through 01/20/2010

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Invoice Number	Invoice Date	Cust. Number	Ship To Number	P.O. Number	Reference No	Order Number	Invoice Total
857070	01/01/2010	CON002	CON002	Verbal	M38 04		4,879.82
857850	01/02/2010	CON002	CON002	Verbal	044 04		6,485.52
858343	01/04/2010	CON002	CON002	Verbal	M44 03		1,567.45
858935	01/04/2010	CON002	CON002	Credit Memo	CR. MEMO		-114.88
859332	01/05/2010	CON002	CON002	Verbal	M44 03		1,405.07
859335	01/11/2010	CON002	CON002	Verbal	M44 03		372.40

- An Item Consumption report will provide your customer's item purchase history over the time period you select.

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DES PLAINES, IL, 60016

Item Consumption
12/01/2009 through 01/15/2010

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Item Number	Description	Brand	Avg. Unit Prc.	Total Qty Ord.	Total Qty Shp.	Total Wgt. Shp.	Total Ext. Amt.
10311	MILK WHOLE 1/GAL	DEANS	3.95	36.0000	36.0000	0.0000	142.04
10311	MILK WHOLE 1/GAL	DEAN'S	3.97	10.0000	10.0000	0.0000	39.70
10311	MILK WHOLE 1/GAL	DEAN'S	3.71	46.0000	46.0000	0.0000	170.48
10312	MILK 2% MILK 1/GAL	DEAN'S	3.84	144.0000	144.0000	0.0000	552.56
10312	MILK 2% MILK 1/GAL	DEAN'S	3.51	162.0000	162.0000	0.0000	568.96
10335	YOGURT,VANILLA 2/5# DEANS	DEANS	8.99	6.0000	6.0000	0.0000	53.92
10335	YOGURT,VANILLA 2/5# DEANS	DEANS	8.95	3.0000	3.0000	0.0000	26.85
10344	BUTTERMILK 1/HG DEANS	DEANS	2.53	785.0000	785.0000	0.0000	1,986.05
10344	BUTTERMILK 1/HG DEANS	DEANS	2.33	899.0000	899.0000	0.0000	2,091.51
10383	CREAM CHEESE PHILLY 30# BULK	PHILLY	2.09	9.0000	9.0000	270.0000	18.81
10383	CREAM CHEESE PHILLY 30# BULK	PHILLY	2.29	9.0000	9.0000	270.0000	618.90

- The Open Balances report used to view your customer's unpaid invoices and payment/credits history.

GIADES RISTORANTE
74 PLAINES RD
DES PLAINES, IL, 60016

Open Balances

entree.NET Distributor
168 Boston Post Road
Madison, CT, 06437

Invoice Number	Invoice Date	Cust. Number	Ship To Number	Invoice Total	Credit	Amount Paid	Invoice Balance
104707	01/12/2010	GIADES		-19.12	0.00	0.00	-19.12
110488	01/23/2010	GIADES	GIADES	603.82	0.00	0.00	603.82
112735	01/25/2010	GIADES	GIADES	708.76	0.00	0.00	708.76
114925	01/30/2010	GIADES	GIADES	811.05	0.00	0.00	811.05
117421	02/02/2010	GIADES	GIADES	520.54	0.00	0.00	520.54
119825	02/07/2010	GIADES	GIADES	1,111.23	0.00	0.00	1,111.23
122167	02/09/2010	GIADES	GIADES	609.94	0.00	0.00	609.94
Total:							
				4,346.22	0.00	0.00	4,346.22

Chapter 12

Help Tab

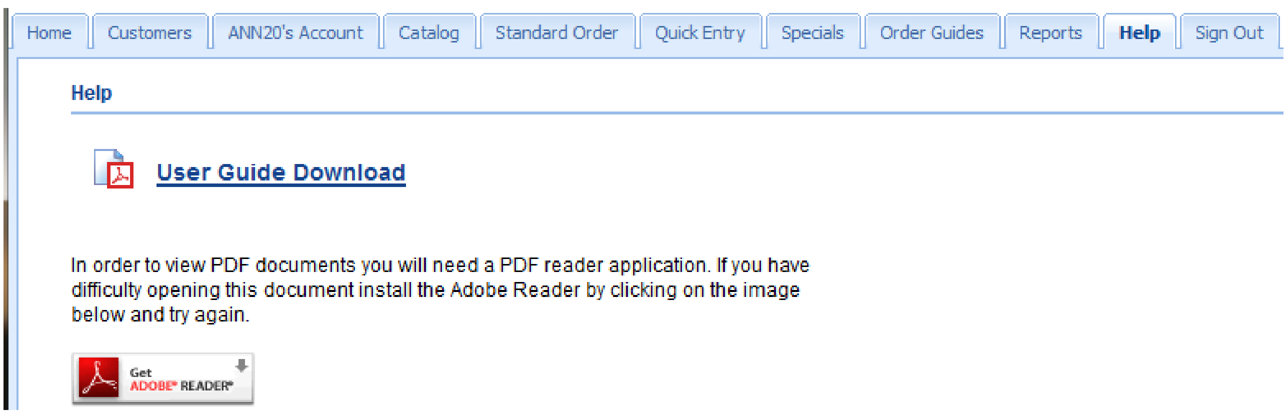
12 Help Tab

entrée.NET Guides

Included with your **entrée.NET** system are customized instructional guides for the System Administrator, Salesperson and Customer. These guides will answer any questions you, your employees and customers may have in addition to making it easy for you to manage your new online ordering system, catalog, and website.

The guides are available as PDF files that you can download via the **Help** tab in **entrée.NET** or from the NECS website at **http://www.necs.com/guides.php?productid=3** or on the internet in an interactive searchable version at **http://www.necs.com/net_KB/**.The guides can easily be read or printed using the free Adobe Reader download.

Note If you do not have the free Adobe Reader software on your computer or if your version of this software is outdated, use the **Get Adobe Reader** link to download and install the latest version.



Chapter 13

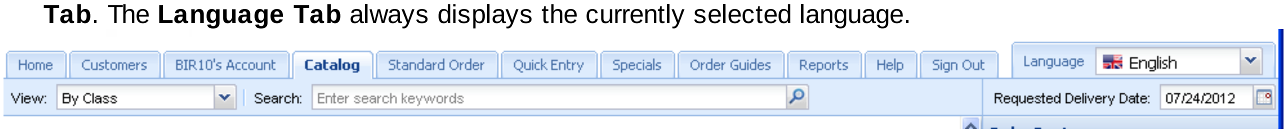
Language Tab

13 Language Tab

If you click on the **Catalog** tab and see the **Language Tab** and drop down menu, that means you can select from up to 2 other languages besides English to view items in our catalog. **Class Names, Item Description line 1**, **Item Description line 2** and **Item Notes** are translated for you. Having language translations in our online ordering system will allow our customers to view items in our catalog and enter orders online in your native language.

How the Language Translation Feature Works

1. Once you log into your account and select a customer to work with in our online ordering system, when you click on the Catalog, Standard Order, Quick Entry or Specials tabs you will see a new **Language Tab**. The **Language Tab** always displays the currently selected language.



2. Click on the **Language Tab** drop down arrow and you will see a list of the available languages.

3. Click on a language in the list to select it.

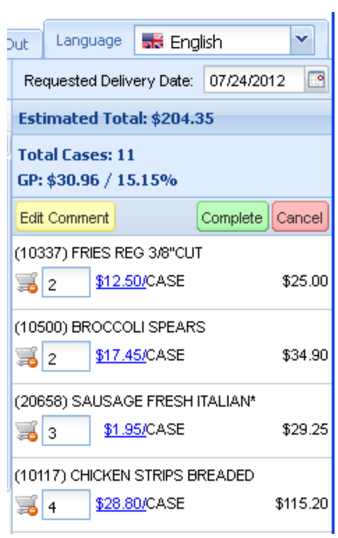
4. You will see the following changes in our online ordering system when a new language is selected:

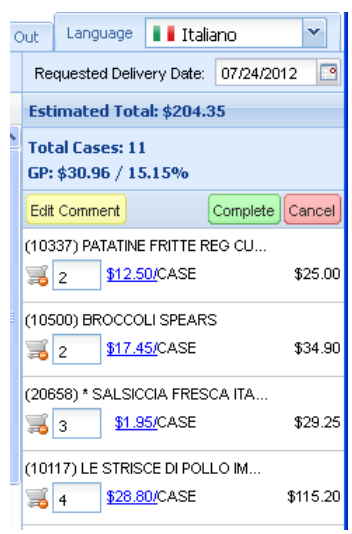
- **Catalog Tab:** When view **By Class** is selected the Class information will be displayed in the selected language. The language examples for the Catalog page below are in Italian.

Reminder: This is not a perfect translation process, but most words will be translated.

- When view **All Items Class** is selected the Description and Classes will be displayed in the selected language.

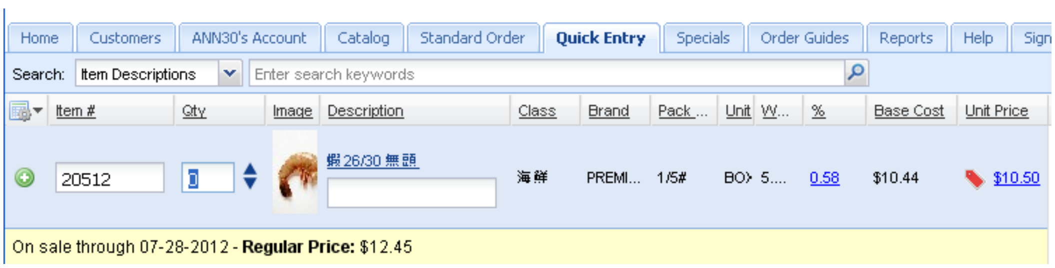
- **Shopping Cart:** The Description column and Class will be displayed in the selected language. Below from left to right is the Shopping Cart with the same items in Chinese, English and Italian.



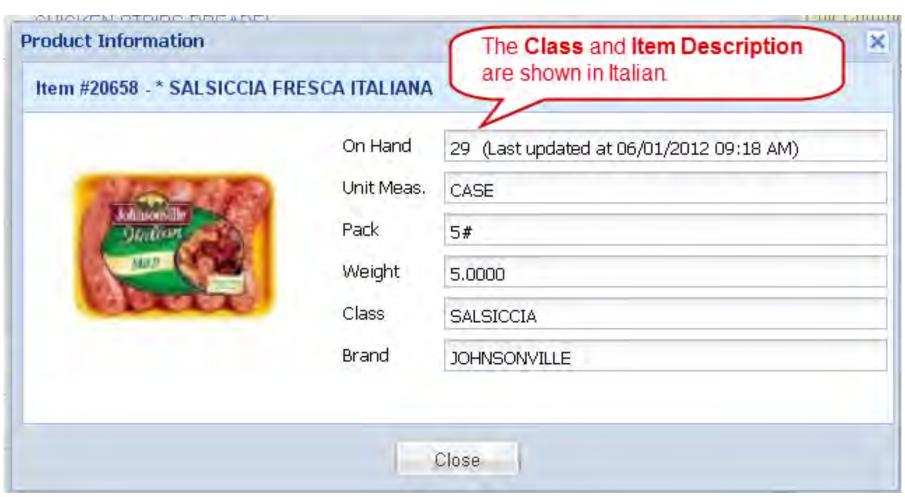


- **Standard Order:** The Description column and Class will be displayed in the selected language.

- **Quick Entry & Specials:** When the item number is entered the Description and Class information will be displayed in the selected language.



- **Product Information:** When the blue **Description** column link in your product catalog is clicked the **Product Information** box opens and the item's Description and Class information will be shown in the selected language.



Chapter 14

Accessing Email and WebMail

14 Accessing Email and WebMail

If your company is using the **entrée.NET** option which includes a website and email accounts, you may have a company mailbox. Our business will have two options available for email processing. You can use WebMail accessed via a web browser or use the mail client software running on your computer.

Microsoft Outlook and Mozilla Thunderbird are two of the most common email client programs. You may already have one of these programs running on your business computer. Please contact our **entrée.NET** System Administrator to assist you with mail client software setup, get your email account created, and to access WebMail.

WebMail

You can read your mail and compose new messages even if you are far from your home or office computer. A WebMail interface has been integrated with our domain. So you can work with your email from any computer with an Internet connection and Web browser installed, or a WAP-enabled cellular phone or a handheld computer (PDA).

Accessing WebMail

1. Open an internet browser (or a WAP browser, if you are working from a handheld device).

2. Type the URL: **http://webmail.mydistributingcompany.com**, where “mydistributingcompany.com” is the name of your domain.

3. Press **ENTER**. The WebMail login screen will open.

4. Type the **Username** and **Password** for your mailbox and click **Log in**.

5. **Username -** is the department or employees full **Email Address**. For example: **angela.zelos@mydistributingcompany.com**

6. **Password -** is the password for your email account.

Source: www.parallels.com ©Parallels Holdings, Ltd.

Chapter 15

Entering Your First Order

15 Entering Your First Order

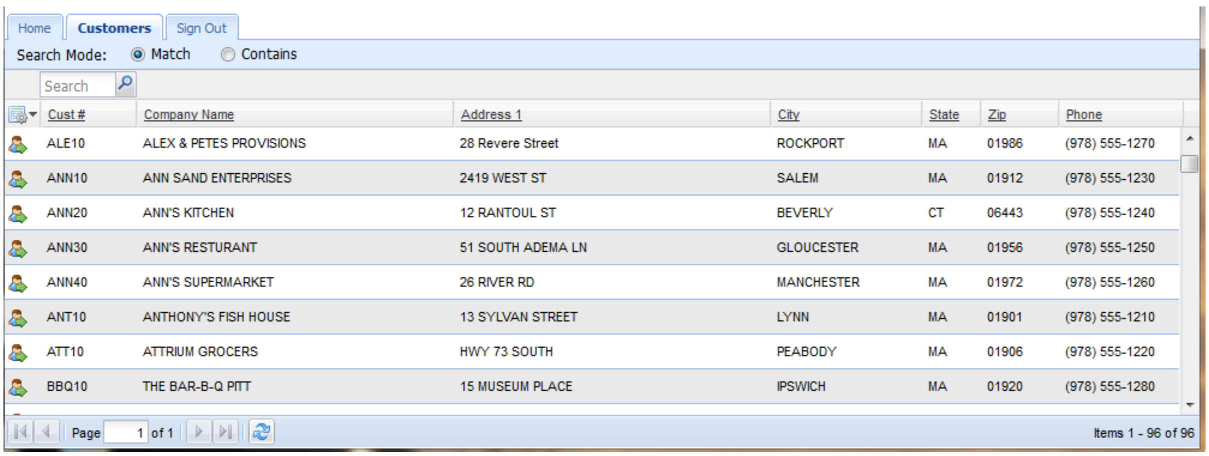
The purpose of this chapter is to show you how easy it can be to enter an order. Though you have many options, we've broken the process down into eight steps which will give you a good overview.

This example will use a method we call **Standard Order** which speeds you through the ordering process. Even though we carry a large amount of products, the **Standard Order** always remembers which of the products you normally order for your customer. It's a great tool not just for the purpose of making the ordering fast, but it also helps remind you of products that your customer normally orders, which you may have forgotten.

Creating an Order for a Customer

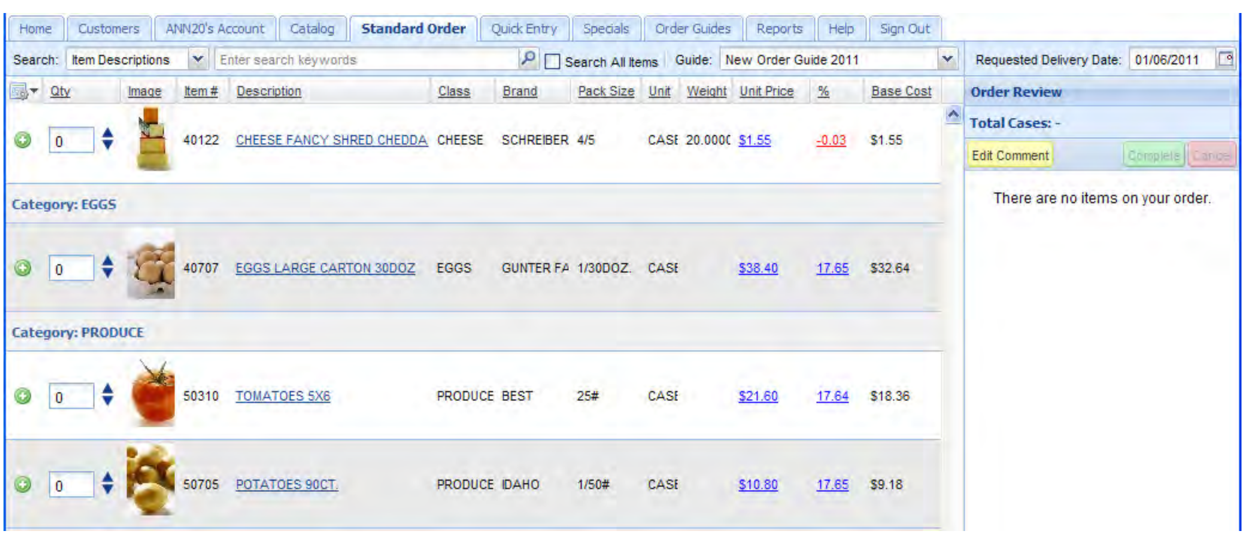
STEP 1. Login to **entrée.NET** using your assigned **Username** and **Password**.

STEP 2. Click on the **Customers** tab then find and select your customer.



STEP 3. Click the **Load Customer** icon  to access your customer's account.

STEP 4. Click the **Standard Order** tab. All the items you normally order for the customer will be displayed.

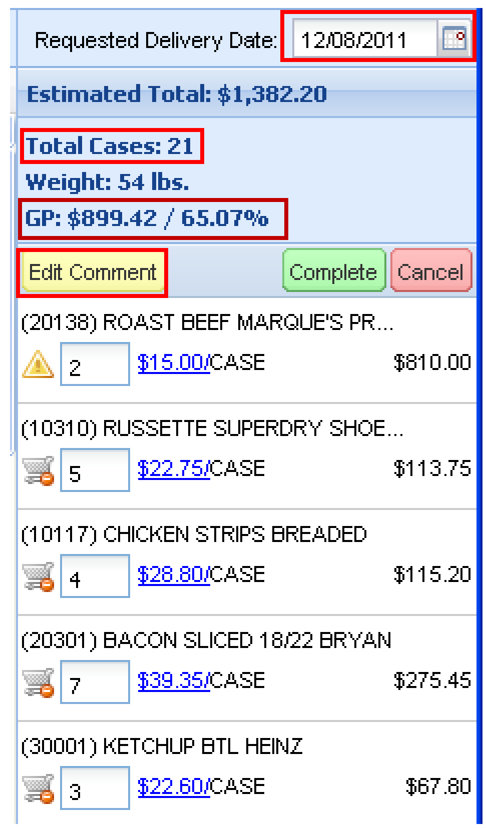


STEP 5. **Need to search for an item?** Just select what you want to search (Description, Class, Brand or Item Number) and enter the search text.

STEP 6. Enter the quantity ordered for each item. You can also use the up/down arrow icons to increase/decrease the quantity. As quantities are entered, the shopping cart to the right shows the ordered items.

STEP 7. Enter the **Requested Delivery Date** (or use the calendar tool) in the shopping cart area.

STEP 8. Click the **Complete** button in the shopping cart. The order is then sent into our main **entrée** software and you will receive an email confirming your ordered items.



Shopping Cart Options:

- The System Administrator can turn on the **Case Count** option so the **Total Cases** quantity will be displayed in the shopping cart area.

- The System Administrator can turn on the **Gross Profit** option so the **GP dollars / percentage** displays in the shopping cart area. This allows you to monitor these values in the top of the cart while you are creating an order.

- The **Edit Comment** button in the shopping cart allows you to manage comments on the order. You can use the comment area to provide information about an item in your order, order delivery or any other information you need to communicate.

- Warnings for **Min/Max Weight** and **Min/Max Amount** will be posted in the cart message area if the System Administrator has them enabled.

  You will be prevented from completing an order only if your **Min/Max Weight** does not meet these restrictions.

  Min/Max Amount restrictions will only posts a warning message and does **not** prevent an order from being completed.

Chapter 16

Editing Item Prices in Orders

16 Editing Item Prices in Orders

Our **entrée.NET** System Administrator has the ability to give Salespeople the following system options:

- If you have the **"Allow Salesperson to modify pricing"** option set to "**Yes**", then you can perform these additional pricing functions if the options are turned on.

- **Allow salesperson to enter prices below the "Minimum Sell Price".** Will allow the salesperson to enter prices below the "Minimum Sell Price" defined on the "**Cost/Price**" tab of "**Inventory File Maintenance**".

- **Allow salesperson to adjust prices by specifying a percentage over "Base Cost"**. Will add a "%" column next to the "Price" column allowing the salesperson to adjust prices by entering a percentage of base cost. The price calculation will follow the rules defined for the "**Customer Special Price Formula**" in **entrée** on the **Price Setup** tab of **System Preferences**.

Editing Prices in a Customer Order

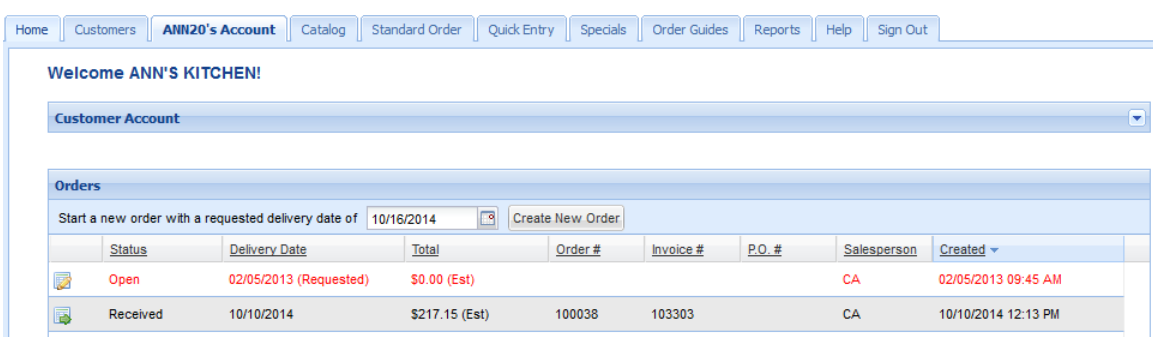
1. Login to **entrée.NET** using your assigned Username and Password.

2. Click on the **Customers** tab then find and select your customer.

3. Click the **Load Customer** icon to access your customer's account.

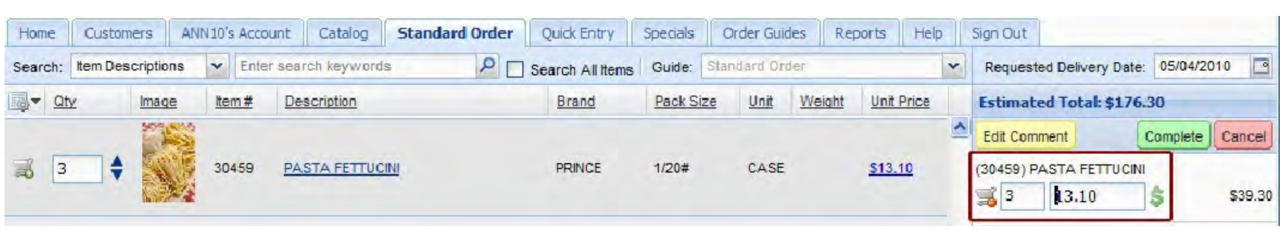
4. Click the **Account** tab and open the **Orders** section. Your customer's current orders will be displayed. You can edit pricing in orders with an **Open** status or you can edit item prices while you are creating your customer's order. The order creation process is detailed in the **Entering Your First Order** chapter of this guide.

5. Click the **Edit/View Order** icon  next to the desired **Open** order.



6. The order will display in the **Standard Order** screen. The **Shopping Cart** will be reloaded with the current order's items and prices.

7. Find the desired item in the **Shopping Cart** on the right. Click on the **blue underlined price** for the item in the Shopping Cart.



8. The price edit box will appear with your cursor inside the price field. Enter the new price for the item.

9. Click outside the price edit box and the price will be updated in the **Shopping Cart** and in **Standard Order** for that customer. Edited prices will be displayed in **green** as shown in the image below.

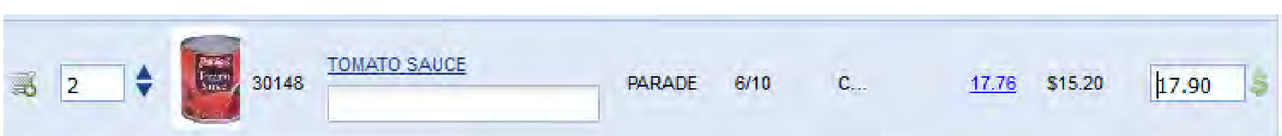
16.1 Price Modifications and Viewing Price Information

When a salesperson has the **Allow salesperson to modify pricing** option turned on they will have the ability to view the item's pricing information in addition to making price changes in an order. This is how it works:

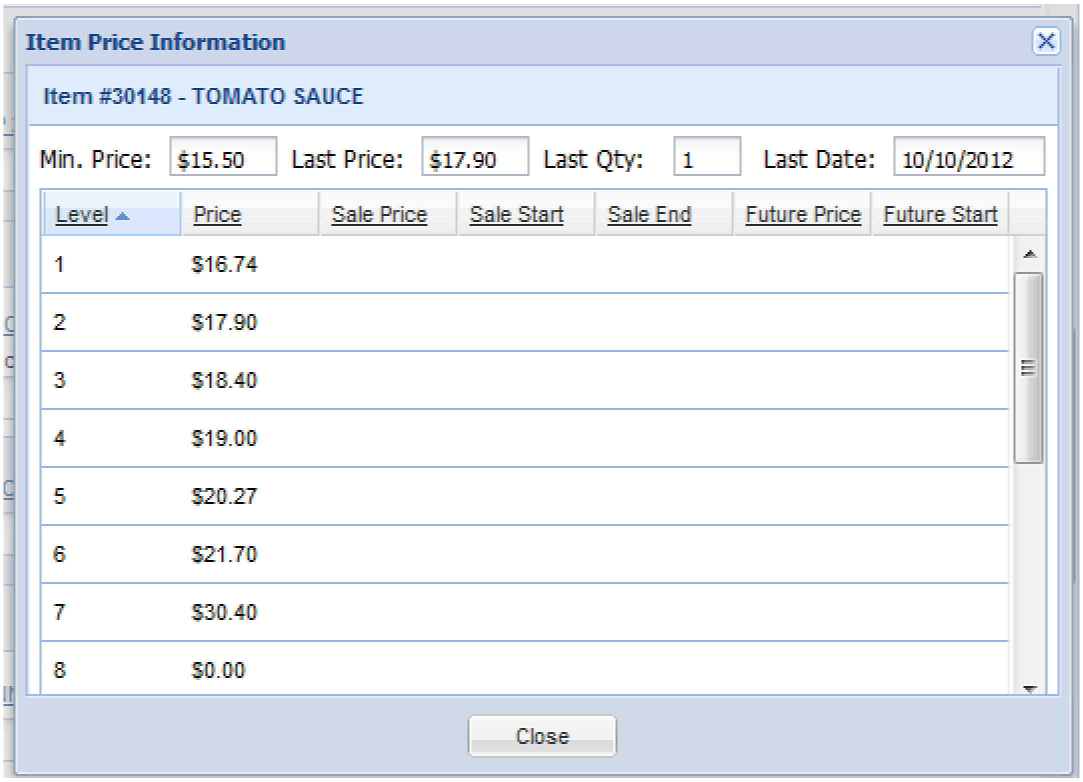
1. You must have the **Allow salesperson to modify pricing** option set to **Yes** by the System Administrator.

2. Items must be in an *open order* or *in the shopping* cart to modify their prices and view the **Item Price Information**.

3. Click once on the **Unit Price** field and the edit price dialog box displays in the **Unit Price** field. A green dollar sign and the edit price dialog box will be displayed with the current price.

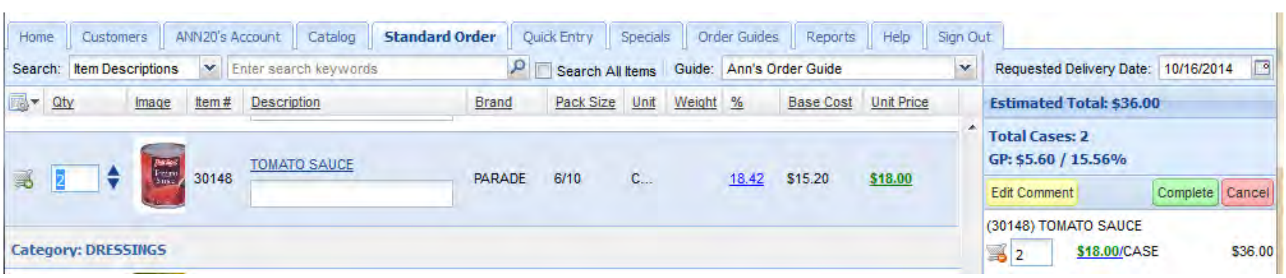


4. Clicking on the green dollar sign triggers the display of the **Item Price Information** pop-up box. All the pricing information you need for that item will be presented so you can make a pricing decision. Click **Close** to exit this display and continue.



5. Then edit the item's price by typing your new price in the edit price dialog box.

6. Click off the price field to exit the edit dialog. The price change will automatically be saved in the open order and in the shopping cart. The price will now be displayed in **green** indicating that the price has been changed.



Price Modifications Using % and Base Cost

If you have the "**Allow salesperson to adjust prices by specifying a percentage over "Base Cost"** option set to "**Yes**", then you will see the **%** and **Base Cost** columns in your item details as shown in the image below. You can adjust prices by entering a percentage of base cost.

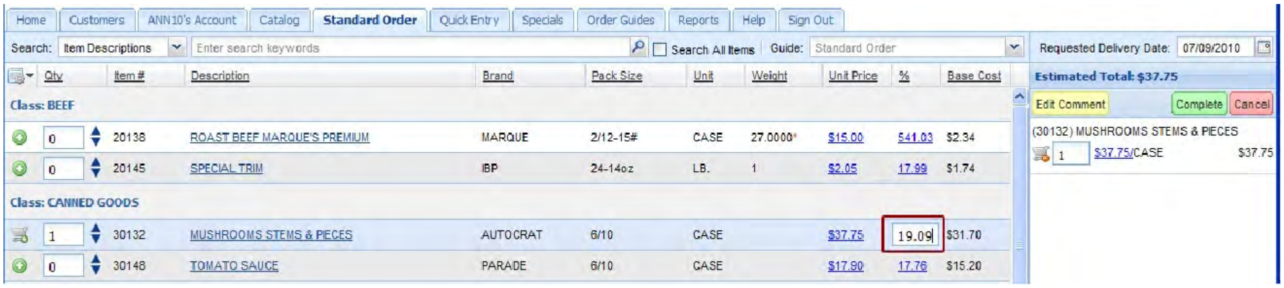
The price calculation will follow the rules defined for the "**Customer Special Price Formula**" in **entrée** on the **Price Setup** tab of **System Preferences**.

Note These calculations are made using the values available to **entree.NET** at the time the order is placed and will only lock the price on the invoice. If any cost changes take place in entree as a result of receiving new product or a manual cost change there is no guarantee that the margins used to create the order in **entree.NET** will reflect the final margins of the invoice.

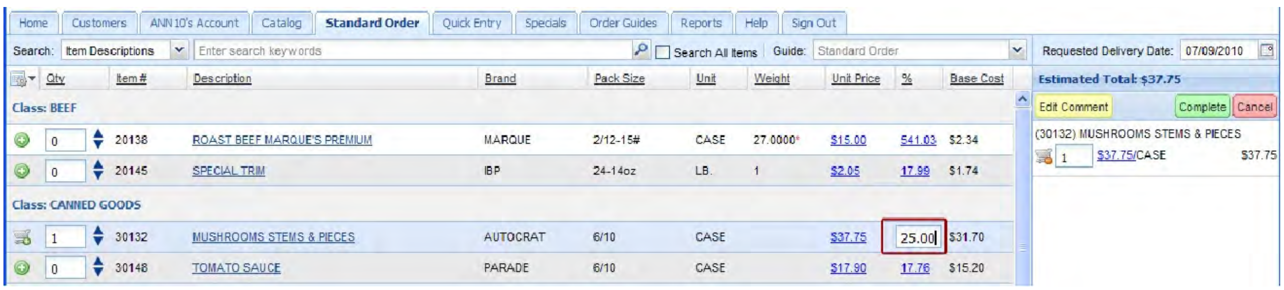
Editing Prices Using % Column

1. Items must be in an open order and in the shopping cart to modify their prices using **%**.

2. Click in the **%** column for the desired item and the edit percentage dialog box displays.



3. Enter a new number for the percentage value and hit the **Enter** key.



4. The **Unit Price** column will update and turn green displaying the new price in the shopping cart and item details.

Chapter 17

Completing an Order

17 Completing an Order

As you enter an order, it's important to note that all the items placed in the shopping cart are being saved on our server. This means that even if you lose your internet connection, or need to break away for a while and **Sign Out**, when you return all your ordered items will remain in your customer's cart.

Editing an Open Order

1. Use your browser to go to our website home page.

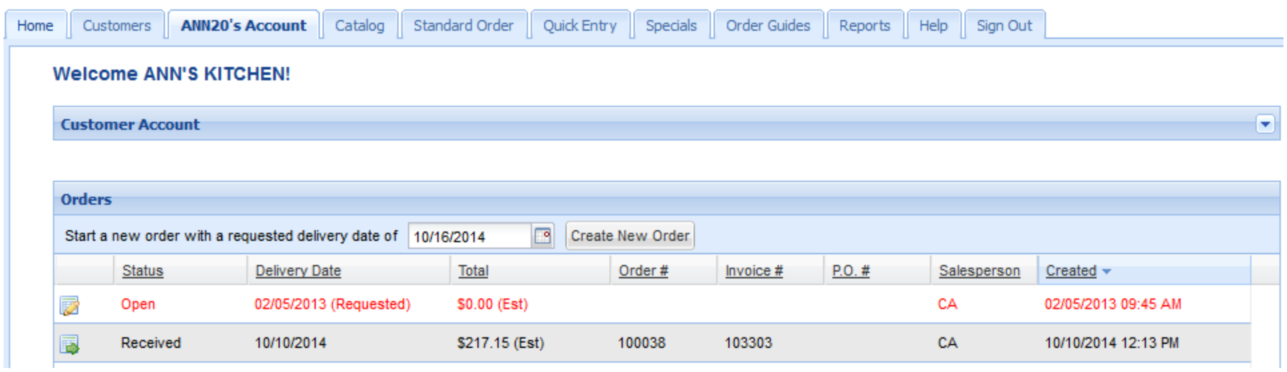
2. Sign In to our website with your assigned username and password.

3. Select your customer from the list in the **Customers** tab.

4. Click the **Load Customer** icon to view the customer's account information.

5. In the **Customer Account** page **Orders** section any incomplete order has a status of **Open**.

6. Click the **View / Edit Order** icon in the first column to view the order details.



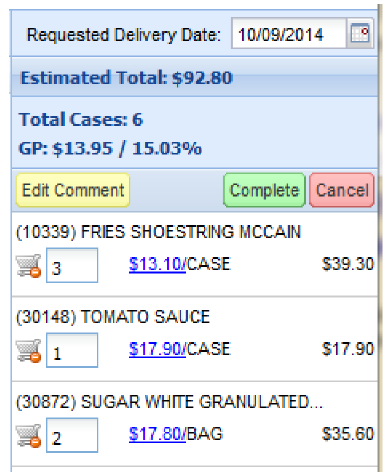
7. The Standard Order screen displays with the shopping cart reloaded with the partial order.

8. Add your new items, update quantities and add comments. Then complete the order and submit it for processing, as detailed later in this chapter.

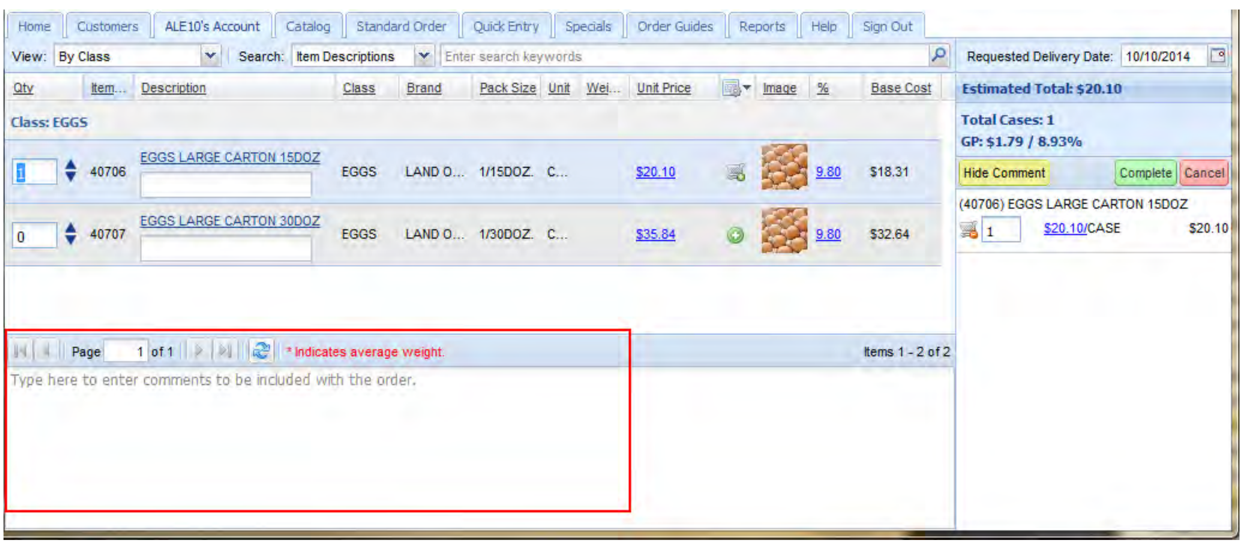
Adding Comments to Your Order

While you are creating your order use the **Edit Comment** button in the upper section of your shopping cart to add comments.

- You can use the comment area to provide information about an item in your order, order delivery or any other information you need to communicate to us.
- Click the **Edit Comment**  button and the comment section opens at the bottom of the screen.



- **"Type here to enter comments to be included with the order**." will be displayed in this section. The Catalog page with the **Comment** section outlined in red. The **Hide Comment** button is now displayed in the shopping cart.



- Click in the comment area and enter your comment.
- When you are finished editing your comment, click the  button to close the comment section of the screen. See image that follows.
- You can switch back and forth between **Edit Comment** and **Hide Comment** while you create your order in the Catalog, Standard Order, Quick Entry, and Specials screens.

Complete Your Order

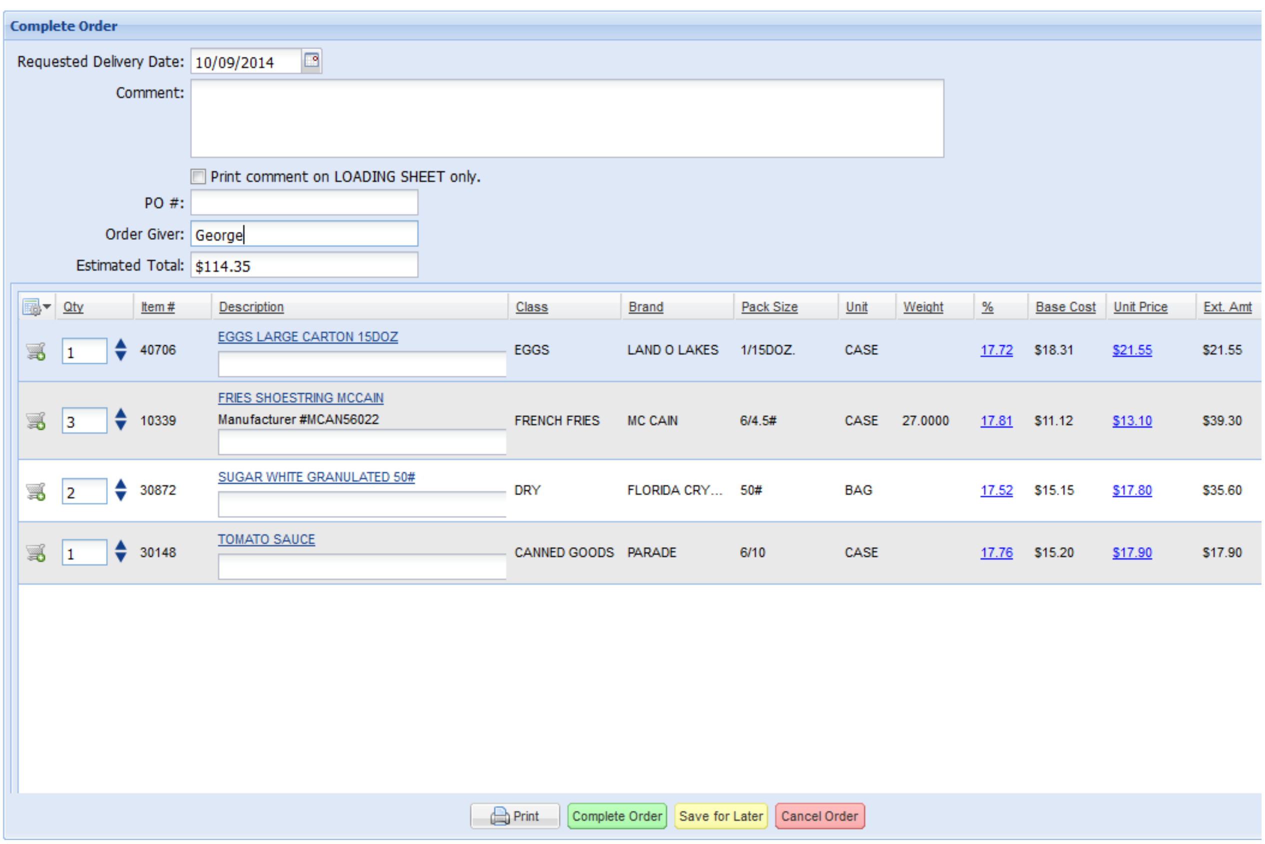
Once you are finished with the process of placing your order, follow these steps to ensure your order is sent to us properly:

1. Once all your items have been selected, review your shopping cart items and quantities.

2. Use the calendar tool  to determine and set your **Requested Delivery Date**.

3. Click  to submit the order for processing in our main order processing system.

4. The **Complete Order** page will now display and your order has a status of "**Pending**".



In Complete Order you can:

a. Change your **Requested Delivery Date**.

b. Enter a **P.O. number**, if required.

c. **Estimated Total**: An estimated total for your order is displayed. Your final total will appear on your invoice.

d. **Comment:** Enter a note or information you need to send to us about the order. Allows you to edit / add comments.

e. Verify your order information and make any last minute quantity changes.

f. Check the **Print Comment on Loading Sheet Only** option.

g. Enter the **Order Giver** name.

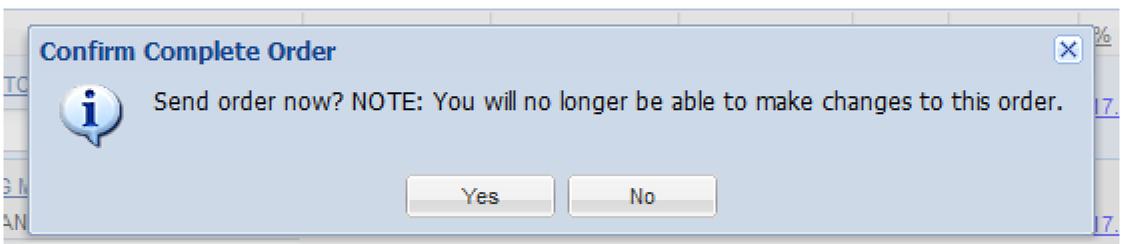
h. Displays the order details for review and updating of quantities and prices.

i. Click the **Complete Order** button when done with changes or you have the option to click **Save for Later** and hold the order for now.

Note **Modification of the Requested Delivery Date now may impact item pricing.**

5. The **Confirm Complete Order** pop-up box displays: “Send order to distributor? Click **Yes** to continue or **No** to stop the order submission process.

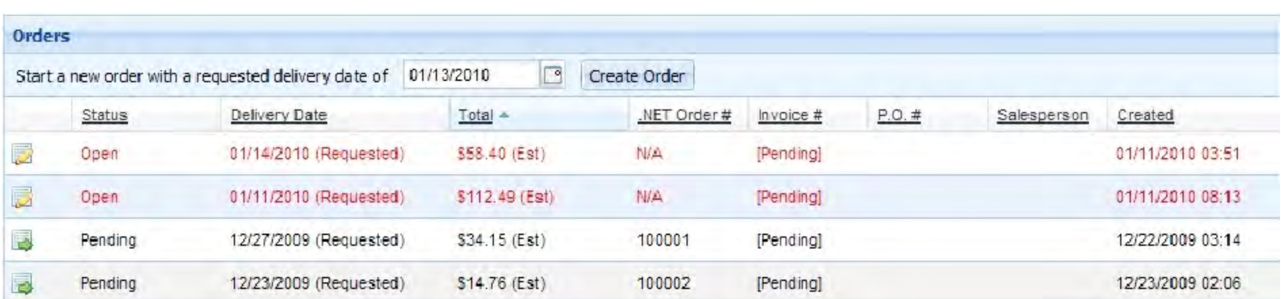
Note **You will no longer be able to make changes to this order.**



6. The **Order Completed** pop-up box displays:
“Your order has been saved and will be processed shortly.” Click **OK**.

7. You will now be returned to your **My Account** page **Order** section where your order has a status and invoice # set to “**Pending**.”

- Click **View Order** icon  to view your order details.
- Once the order has been completed no additional edits are allowed.



Orders

Start a new order with a requested delivery date of 01/13/2010 Create Order

	Status	Delivery Date	Total	.NET Order #	Invoice #	P.O. #	Salesperson	Created
	Open	01/14/2010 (Requested)	$58.40 (Est)	N/A	[Pending]			01/11/2010 03:51
	Open	01/11/2010 (Requested)	$112.49 (Est)	N/A	[Pending]			01/11/2010 08:13
	Pending	12/27/2009 (Requested)	$34.15 (Est)	100001	[Pending]			12/22/2009 03:14
	Pending	12/23/2009 (Requested)	$14.76 (Est)	100002	[Pending]			12/23/2009 02:06

8. When you view your order, you have the option to print the order by generating a PDF document.

   a. Click the **Print** button at the bottom of the screen. Print

   b. The **Print Order** download dialog box will appear.

   c. If you do not have the Adobe Reader installed on your computer, click the **Get Adobe Reader** button to download and install it.

   d. Select the link **Click here to download a PDF of this order**.

   e. The PDF document will be displayed. Use the Adobe Reader tools to print, and if you like, save a copy of the order on your computer.

9. Click the **Sign Out** menu tab to exit our online ordering system website.

10. **Email Notification** of your order status will be sent to you during order processing.

Note The email address you entered in the **Account** will be used for sending this email.

Example An example of the emailed attached invoice PDF.

necs entrée

Online Order
Printed: 10/09/2014 12:47 PM
Status: Pending transfer to distributor.
Order Giver: George

[TESTING] Fran
168 Boston Post Road
MADISON, CT 06443
Phone: (203) 245-3999
Fax: (203) 245-4513

Bill To:

FOOD PALACE RESTAURANT
24 COE AVE
EAST HAVEN, CT 06512
Phone: (203) 488-7654

Ship To:

FOOD PALACE RESTAURANT
24 COE AVE
EAST HAVEN, CT 06512
Phone: (203) 488-7654

Customer No.	Order Number	Customer Purchase Order	Order Date	Req. Delivery Date	Invoice No.
FPAL01	100037		10/09/2014	10/09/2014	PENDING

Item Number	Qty Ord	Unit Meas	Pack Size	Description	Brand	Unit Price	Estimated Ext. Amount
40706	1.00	CASE	1/15DOZ.	EGGS LARGE CARTON 15DOZ	LAND O LAKES	21.55	21.55
10339	3.00	CASE	6/4.5#	FRIES SHOESTRING MCCAIN	MC CAIN	13.10	39.30
30872	2.00	BAG	50#	SUGAR WHITE GRANULATED 50#	FLORIDA CRYSTAL	17.80	35.60
30148	1.00	CASE	6/10	TOMATO SAUCE	PARADE	17.90	17.90

Pricing is estimated and subject to change.

Estimated Total
114.35

Example An example of the email you will be sent confirming your order with an attached PDF file containing the invoice. Both the Ship To and Bill To addresses are now on the order along with the Order Giver information.

From [TESTING] Fran
Subject **FOOD PALACE RESTAURANT has completed a new online order.**
To Fran NECS

Reply | Reply All | Forward | Archive | Junk | Delete
12:47 PM
Other Actions

FOOD PALACE RESTAURANT (FPAL01) has completed a new order #100037.

A copy of the submitted order follows:

Ship To:
FOOD PALACE RESTAURANT
24 COE AVE
EAST HAVEN, CT 06512
Phone: (203) 488-7654

Bill To:
FOOD PALACE RESTAURANT
24 COE AVE
EAST HAVEN, CT 06512
Phone: (203) 488-7654

Order No: 100037
Customer: FPAL01
Order Giver: George
Delivery Date: 2014-10-09
Purch No:
Est. Total: 114.35
Cases: 7
Line Count: 4

Item #	Unit Meas.	Description	Qty	Unit Price	Estimated Ext. Amount
40706	CASE	EGGS LARGE CARTON 15DOZ	1.00	21.55	21.55
10339	CASE	FRIES SHOESTRING MCCAIN	3.00	13.10	39.30
30872	BAG	SUGAR WHITE GRANULATED 50#	2.00	17.80	35.60
30148	CASE	TOMATO SAUCE	1.00	17.90	17.90

*** Please do not reply to this email, as the address ***
*** it was sent from does not accept incoming mail. ***

1 attachment: 100037.PDF 22.8 KB
Save

Canceling an Order

- You can cancel your customer's order anytime during the ordering process by clicking the Cancel Order button in the shopping cart.
- Once the order has been completed, as described in the **Completing Your Order** section above, no additional changes are allowed, including canceling it online.
- If you need to cancel a submitted order, please contact our customer service department.

Chapter 18

Prospects Tab

18 Prospects Tab

Prospects Feature Overview

The purpose of the “Prospects” feature is to provide the company with a set of tools which can be used by managers and salespeople to prepare quotes for potential customers. Two new tabs have been added to your menu to support this feature; **Prospects** and **Reports**. The **Prospects** tab is where you will create and maintain your prospect accounts and create prospect guides for price quotes. The **Reports** tab contains two new reports created to support prospect management, the “Prospect Listing” and “Prospect Guide”. The conversion of a prospect account to regular customer account will be completed by a manager.

Note Orders cannot be placed for prospects and they are not included in your customer listing. Each prospect has a “Status” associated with them to indicate their current position in the prospect to customer conversion chain. These statuses are:

Active	Initial state indicating that this is an active prospect.
Pending	Indicates that this prospect is ready to be converted into a customer.
In Process	Indicates that the conversion to a customer is in process and pending confirmation from the main system.
Converted	Indicates that the prospect has been converted to a customer.

Where do your prospects come from?

1. The designated Prospects Manager or System Administrator can assign prospects to you from:

   a. Prospects the manager has added into the **entrée.NET** system.
   b. Submissions received via the website **Request Quote** feature.

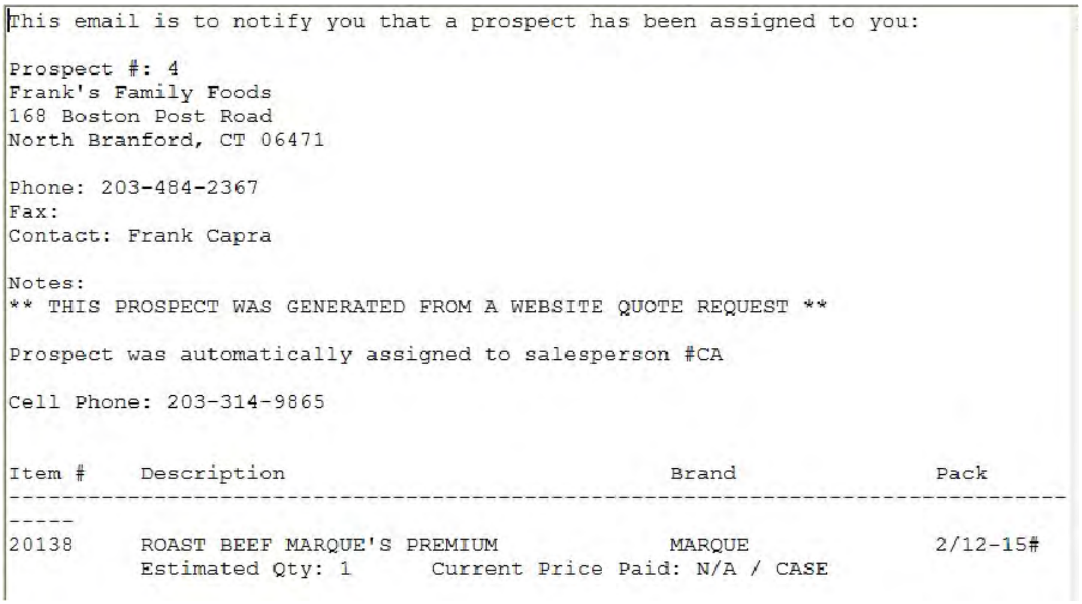
2. You can add your own prospects into the **entrée.NET** system.

There are two possible email notifications you will receive when assigned a new prospect.

- An email notification when a prospect has been assigned to you by a manager as in the example below.

```
This email is to notify you that a prospect has been assigned to you:

Prospect #: 5
Villlage Diner
11 Whitefield Street
Guilford, CT 06432

Phone: 2032453999
Fax: 2032453888
Contact: Nick Avgerinos

Notes:
Interested in changing supplier.
```

- Or when a prospect is assigned to you as a part of the **Request Quote** process in our website you will receive an email similar to the example below.



```
This email is to notify you that a prospect has been assigned to you:

Prospect #: 4
Frank's Family Foods
168 Boston Post Road
North Branford, CT 06471

Phone: 203-484-2367
Fax:
Contact: Frank Capra

Notes:
** THIS PROSPECT WAS GENERATED FROM A WEBSITE QUOTE REQUEST **

Prospect was automatically assigned to salesperson #CA

Cell Phone: 203-314-9865


Item #     Description                             Brand               Pack
--------------------------------------------------------------------------------
-----
20138      ROAST BEEF MARQUE'S PREMIUM             MARQUE              2/12-15#
           Estimated Qty: 1      Current Price Paid: N/A / CASE
```

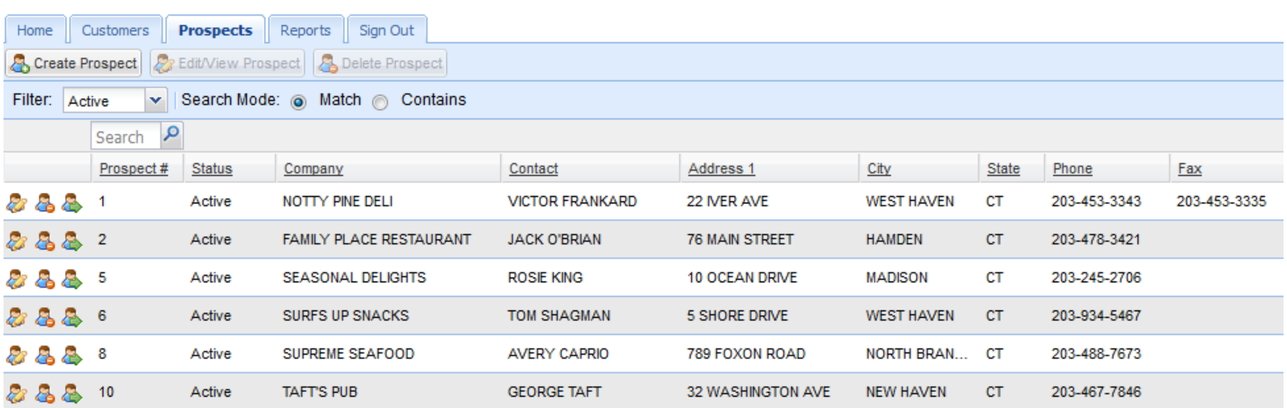
18.1 Prospects Tab Overview

The **Prospects** tab is where salespeople can create, edit, and delete prospect accounts. Prospect accounts will also be created automatically via our website when a potential customer uses the **Request Quote** feature in the **Catalog** page. Only the designated Prospects Manager or System Administrator is allowed to convert prospects accounts to regular customer accounts.

A salesperson is allowed to edit **one** “prospect guide” per prospect account to use for quoting prices. The prospect guide is very similar to the **Order Guide** feature already provided in the system for customers. Refer to the Order Guides chapter in this guide for more information. The prices in the prospect guide can be edited similar to the price editing feature in a regular customer order.

When a prospect account is ready to become a real customer account you will check the “**Ready to Convert**” check box and the status of the prospect will be set to the “Pending”.

Salespeople are **not** allowed to make any additional changes to the prospect account at this time. Only a Prospects Manager can continue to change the prospect information and prospect guide until it has been converted to a regular customer account.



Prospect #	Status	Company	Contact	Address 1	City	State	Phone	Fax
1	Active	NOTTY PINE DELI	VICTOR FRANKARD	22 IVER AVE	WEST HAVEN	CT	203-453-3343	203-453-3335
2	Active	FAMILY PLACE RESTAURANT	JACK O'BRIAN	76 MAIN STREET	HAMDEN	CT	203-478-3421	
5	Active	SEASONAL DELIGHTS	ROSIE KING	10 OCEAN DRIVE	MADISON	CT	203-245-2706	
6	Active	SURFS UP SNACKS	TOM SHAGMAN	5 SHORE DRIVE	WEST HAVEN	CT	203-934-5467	
8	Active	SUPREME SEAFOOD	AVERY CAPRIO	789 FOXON ROAD	NORTH BRAN...	CT	203-488-7673	
10	Active	TAFT'S PUB	GEORGE TAFT	32 WASHINGTON AVE	NEW HAVEN	CT	203-467-7846	

Prospects Tab Details

- **Create Prospect** button – Click to create a new prospect account.
- **Edit / View Prospect** button – Click to edit or view a prospect account.
- **Delete Prospect** button – Click to delete a selected prospect account.
- **Filter** – A drop down list of the status values or “All” used to filter the prospect accounts list.
- **Search Mode** - Select either “Match” or “Contains”.
- **Search box** - Type a word or letters here then click the search icon to get your results.
- First column – contains the icons for **Edit / View Prospect,** **Delete Prospect** and **View Prospect Guide** functions.
- **Prospect #** – The prospect number assigned by the system when the account is created.
- **Status** – The current status of the prospect account. Possible values are: “**Active**”, “**Pending**”, “**In Process**” or “**Converted**”. This value is controlled by the system.
- **Company** – The name of the prospect seeking price quotes.
- **Contact** – The prospect contact person’s name.
- **Address 1** - The street address information for the company.
- **Address 2** – The 2nd line of the street address information for the company.
- **City -** The city where the prospects office is located.
- **State -** The state information for the prospect.
- **Phone -** The prospects phone number.
- **Fax -** The prospects fax number.

18.2 Adding New Prospects

Adding New Prospects to entrée.NET

There are two ways prospects are added to **entrée.NET**, manually by using the **Prospects** tab.

Or if you have the website option (not true for website only option), prospects are automatically created in the system by turning on the **“Create prospects for quote requests from the website.”** option.

To manually create a new prospect account in the Prospects tab:

1. Click the **Prospects** tab.
2. Click the **Create Prospect** button.
3. The **Create New Prospect** dialog box will display.
4. Fill in your prospect’s **Address** information.

5. Fill in the **Contact** information.

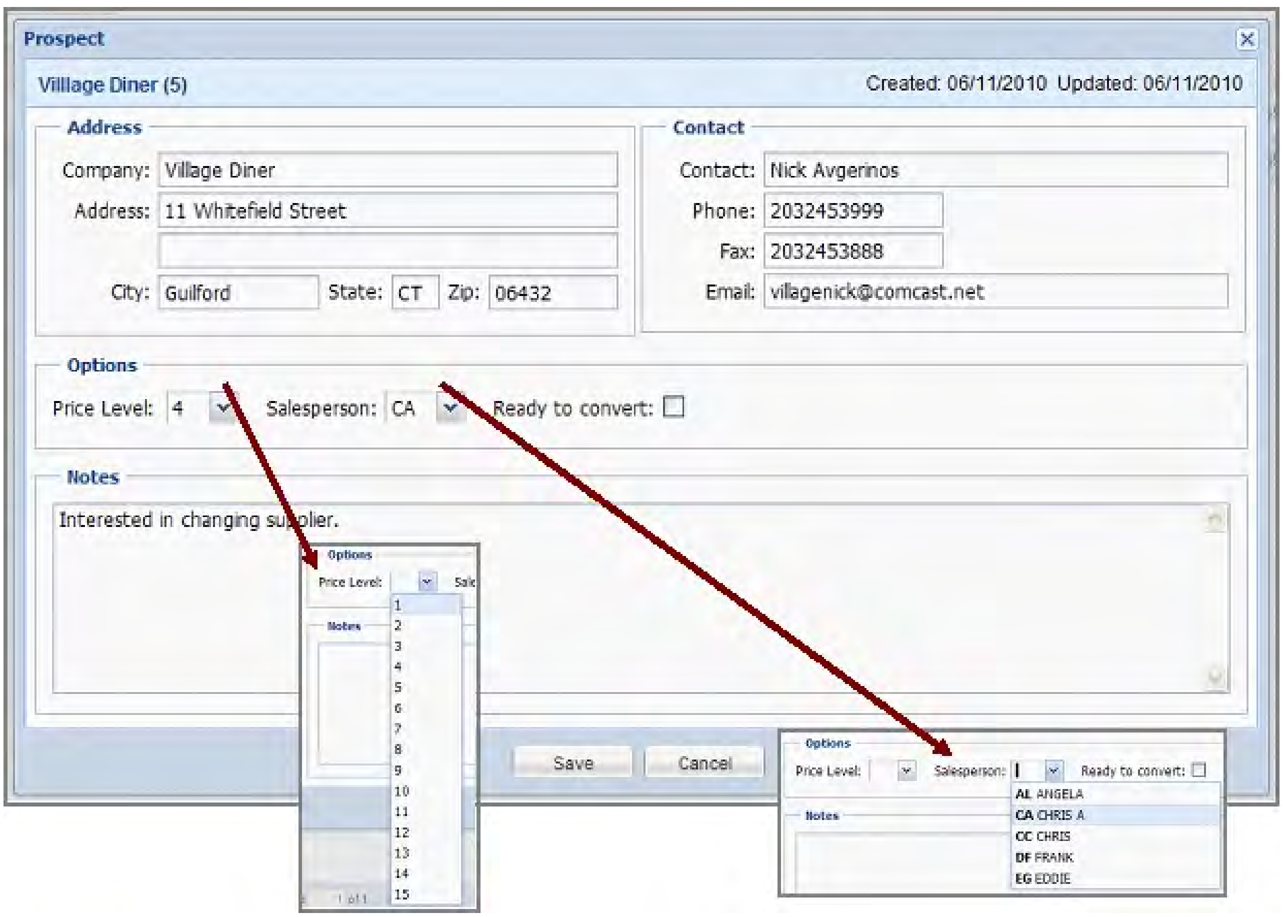
6. In the **Options** section make selections for:

   - **Price Level** from the drop down list.
   - **Salesperson** from the drop down list.
   - **Ready to Convert** will **only** be checked when the prospect is ready to be converted to a regular customer account.

7. **Notes** – Enter any notes about the prospect in the section provided to assist in your work with them.

8. Click **Save**.

Note The **Creation** and **Updated** fields in the upper right corner. The **Updated** field value will change each time a prospect account has been modified and saved.

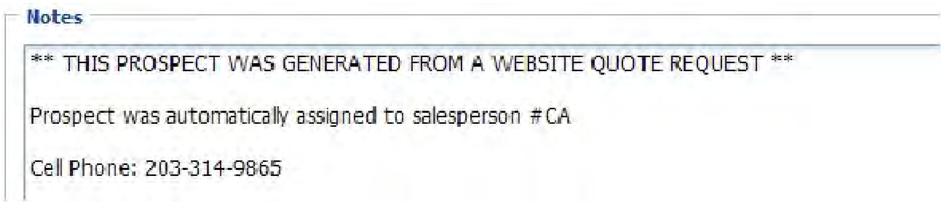


New Prospect Accounts from our entrée.NET Website

When our website creates a prospect account automatically from the **Request Quote** process emails are sent to the Prospects Manager. See the **Request Quote** chapter in this guide for more information. As a part of the **Prospects** feature a “new prospect notification” email will also be sent as a part of the automatic assignment of salespeople in the **Request Quote** process. An example of this email was shown earlier in this chapter.

Note **It is important to regularly monitor your emails for notifications from your website.**

Once a prospect account is listed in the **Prospects** tab follow steps 6 – 8 in the **Adding New Prospects to entrée.NET** procedure above. The **Notes** section will contain the notes from the email notification as shown below.



18.3 Edit / View Prospects

During the process of working with your prospects you will need to view, update, provide additional notes or create a prospect guide. The process to create prospect guides will be covered next in this chapter. To update your prospect accounts follow this procedure:

1. Click the **Prospects** tab.
2. Select and highlight the prospect account in the list.
3. Click the **Edit / View Prospect** button or the **Edit / View** icon.
4. The **Prospect** dialog box will display with the **Company** name and their assigned **Prospect #** in the upper left corner of the dialog box.
5. Edit the prospect’s **Address** information as required.
6. Edit the **Contact** information as required.
7. In the **Options** section make modifications as required for:
   - **Price Level** from the drop down list.
   - **Salesperson** from the drop down list.
   - **Ready to Convert** will **only** be checked when the prospect is ready to be converted to a customer account.
8. **Notes** – Enter any additional notes about the prospect account to assist in your work with them.
9. Click **Save**.

18.4 Deleting a Prospect

To remove prospect accounts from the **Prospects** tab follow these steps:

1. Click the **Prospects** tab.

2. Select and highlight the prospect account in the list.

3. In the left column click the **Delete** icon  or click the **Delete Prospect** button.

4. The **Delete Prospect** confirmation dialog box will be displayed.

5. Click **Yes**.

18.5 Prospect Guide Overview

Prospect Guides are similar to the **Order Guides** you can create for customers. When you want to provide a price quote to a prospect you can create a prospect guide. A salesperson is allowed to edit **one** “guide” per prospect. The prices in the prospect guide can be edited by using the same method currently used for customer orders in the shopping cart and in the other screens used to add items to orders.

Prices in the prospect guide are calculated using the price level assigned to the prospect. The price level is set during the process of creating the prospect. Price levels can be adjusted in the **Edit / View Prospect** dialog by selecting a new price level from the drop down list.

Prospects Guide Details

- **Add Item** button - Click to add a new item to the guide list.
- **Remove Selected** button - Click to delete the selected item.
- **Add Category** button - Click to create a new category for the guide list.
- **Re-Apply Sort** button - Click to re-apply the previous sort.
- **Save Guide** button - Click to save the current information in the prospect’s guide.
- **Cancel** button - Click to delete the current prospect guide.
- **Company** and **Prospect #**
- Green plus tool column.
- **Seq –** The system Sequence number.
- **Category –** The product category.
- **Unit Price –** The unit price is an editable field in the prospect guide.

- **Item # -** The item number from the product catalog.
- **Description –**Click the blue description link to view the product information.
- **Class –** The item class.
- **Brand –** The item brand.
- **Pack Size –** The pack size for the item.
- **Unit** - The unit the item is sold by.
- **Weight –** The weight of the item.

Note Item weight with a red asterisk * is the average weight.

18.6 Creating a Prospect Guide

1. Click the **Prospects** tab.
2. Select and highlight the prospect account who will receive the prospect guide.
3. Click the **View Prospect Guide** icon.
4. The **Prospect Guide** screen will display with the **Company** name and their assigned **Prospect #** in the upper right section of the menu.

The blue Unit Price is an editable field in the Prospect Guide screen.
The Unit Price value in the red square is in edit mode.

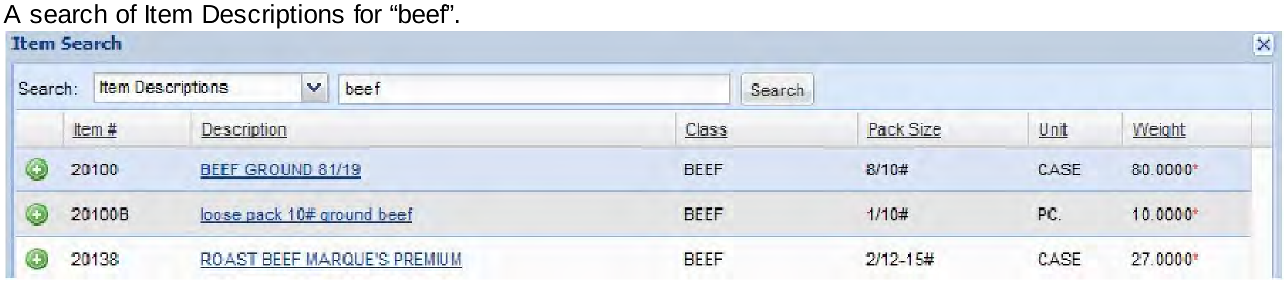
5. Click the Add Item button to search for and add items to the prospect guide.
6. The Item Search dialog box will display.
7. Make a selection from the **Search** drop down list.
   You can search by **Item Description**, **Class** or **Item Number**.

8. Type a word, class or item number in the search box.
9. Click the **Search** button.

10. When the search results are displayed, click the blue **Description** link to view the product information.
11. Click the green plus icon to add the item to your prospect guide list.
12. Continue the search and add item process until all the desired items are in the prospect guide.
13. Now you can edit the **Unit Price** for the selected items.
14. Click the **Save Guide** button.

Note You should always click **Save Guide** after making any changes.

A search of Item Descriptions for "beef".



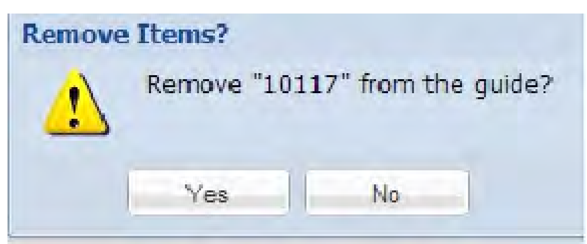
A beef item added to the Prospect Guide screen.

18.7 Working with Prospect Guides

Once you have created your **Prospect Guide** if you need to make changes. These functions are available when you are in the **Prospect Guide** screen:

Remove Selected

1. Select and highlight the item to be removed from the **Prospect Guide**.
2. Click the **Remove Selected** button. The **Remove Item** confirmation box will display using the **Item Number** not the **Description** field.
3. Click **Yes.**



Add Category

1. Click the **Add Category** button to add a new **Category** to the current **Prospect Guide**.
2. The **Add New Category** dialog box will display.
3. Type the name for the new category in the box and click **OK**.
4. Now you can add items to this new category in your prospect guide.

Re-Apply Sort

Some column heading can be used to sort items **within category** in your prospect guide list in ascending or descending order. These columns are: Item #, Description, Class, Brand, Pack Size, and Unit.

1. Click the column heading and a sort direction arrow will appear.
2. Click the arrow again to change the direction of the sort.
3. Click the **Re-Apply Sort** button to re-apply the previous sort.

Cancel

1. Click the **Cancel** button.
2. The current **Prospect Guide** will be deleted.

18.8 Converting Prospects to Customers

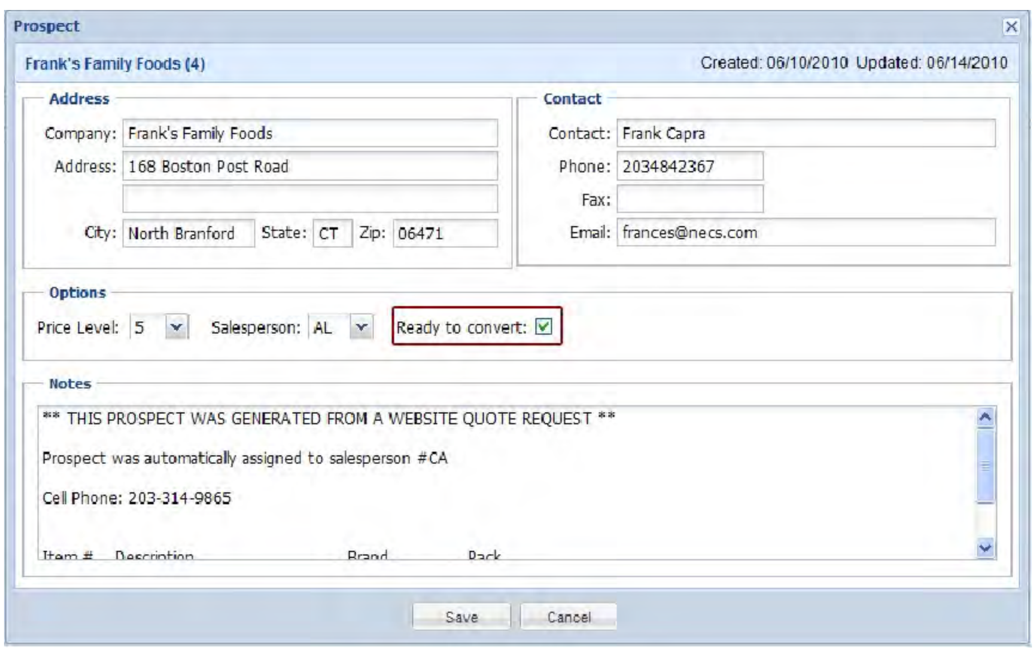
Marking a Prospect for Conversion to Customer

1. Click the **Prospects** tab.

2. Select and highlight the prospect account who will be converted to a new customer account.

3. Click the **Edit / View Prospect** button or the **Edit / View**  icon.

4. The **Prospect** dialog box will display with the **Company** name and their assigned **Prospect #** in the upper left corner of the dialog box.

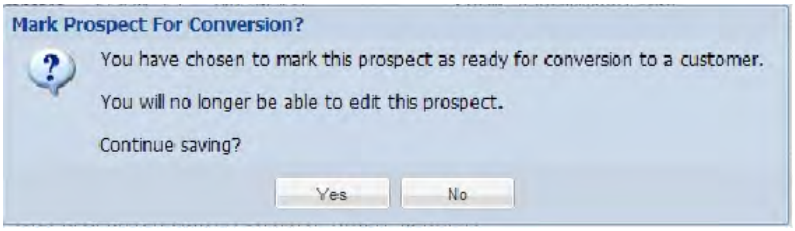


5. Displayed in the first line is "Create customer from "**Company**"" with the selected prospect company name. If this is not the correct prospect account, click the **Cancel** button.

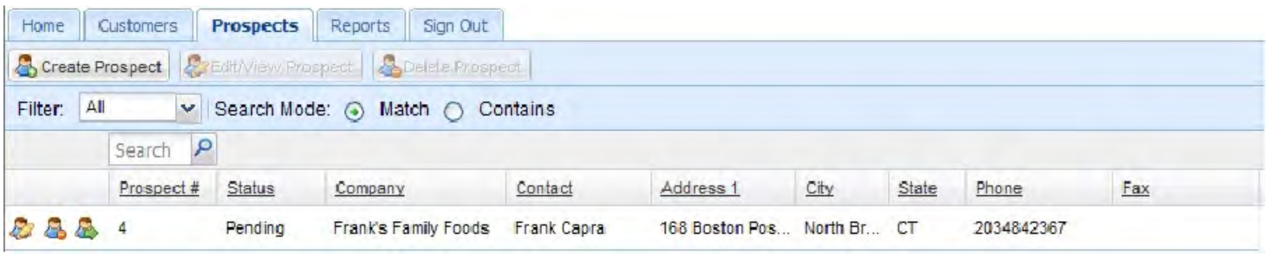
6. In the **Options** section, click to check the **Ready to Convert** check box. This should **only** be checked when the prospect is ready to be converted to a customer account by a manager.

7. Click the **Save** button.

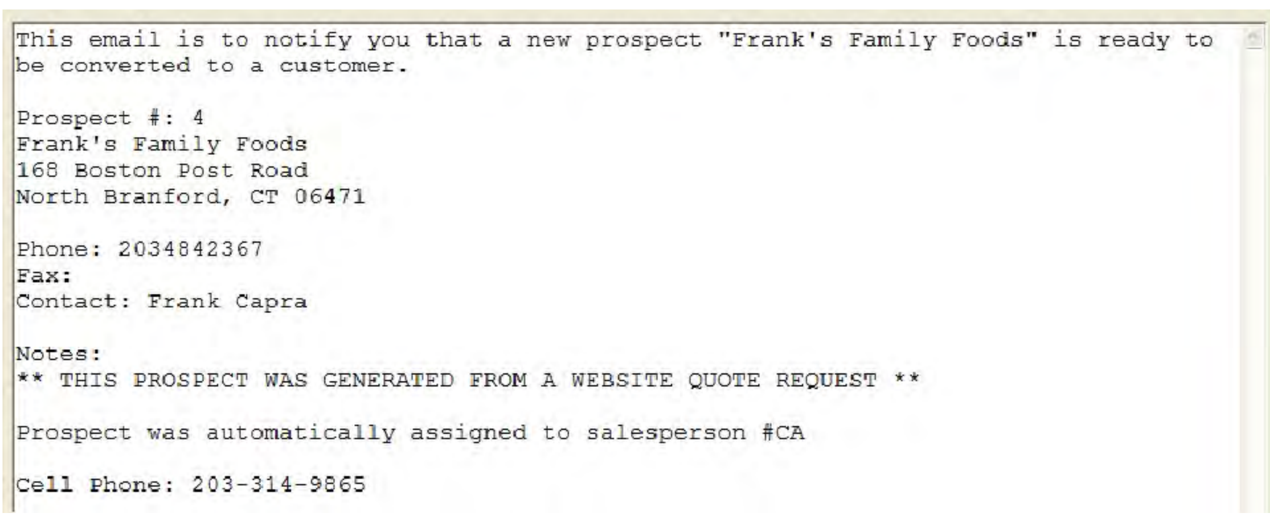
8. The **Mark Prospect For Conversion?** confirmation dialog box will be displayed. Click **Yes** to continue with the conversion process or click **No** to cancel submission for conversion to customer.



9. Now the **Prospects** tab will display a **Status** of “In Process” for this prospect account.



10. Now an email notification will be sent to our Prospects Manager or System Administrator who will complete this conversion process.



Chapter 19

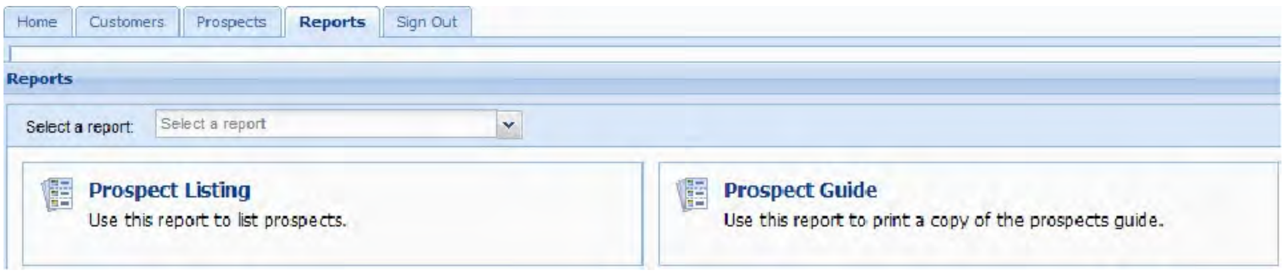
Reports Tab Prospects

19 Reports Tab Prospects

The easy to use **Reports** tab for the Prospects feature allows you to obtain important information about the status and numbers of prospects you have been assigned and the prospect guides you created to provide price quotes in **entrée.NET**. You have complete control to customize and save the style of reports you prefer. You can access your reports via the main reports page link list or use the **Select a report** drop down menu. This drop down menu is available to you in all of your report generating and configuration pages. The reports currently provided are:

- **Prospect Listing** - Provides information about your prospect accounts.

- **Prospect Guide** - Provides a listing of the items and price quotes in a prospect guide created for a specific prospect account.



You select which columns you would like to see and in what order, choose filters, and select how the reports sort, subtotal and group.

When you select the **Reports** tab you will be presented with a list of the available reports and a short description. You can access your reports via the main reports page link list as shown above or use the **Select a report** drop down menu.

19.1 Customizing Prospects Reports

The information displayed in your reports can be customized to suit your business requirements. You can create and save custom report configurations geared to your reporting style to make running periodic reports your way an easy and convenient process.

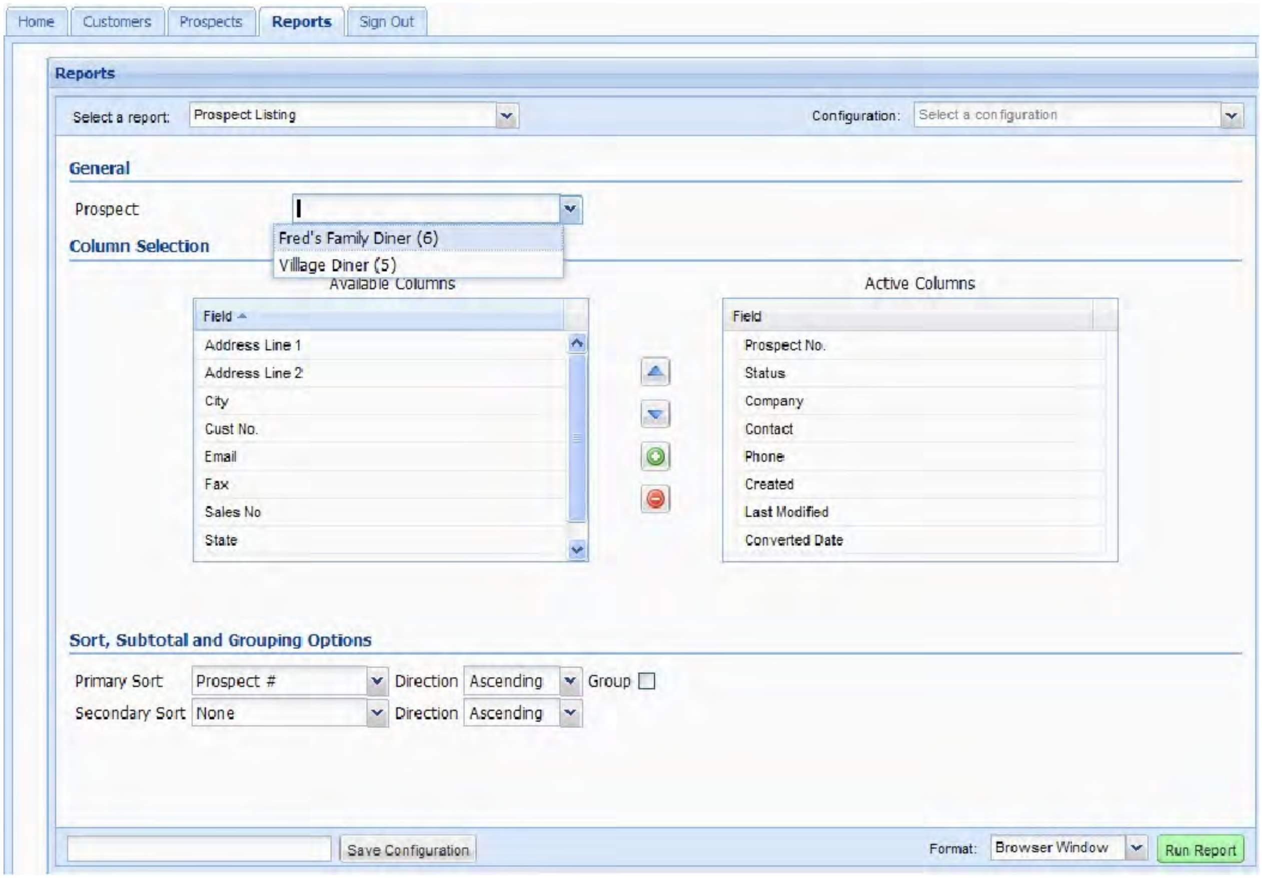
Report Generation

- **Select a report** using the drop down list and a saved custom report style from the **Configuration** drop down list.

- For the **Prospect Guide** report in the **General** section use the **Prospect** drop down list to select the desired prospect.

- Each report has an **Available Columns** list and **Active Columns** list. The **Active Columns** list will be the columns used in the final report.

- This is the **Prospect Listing** report configuration page with the **Available Columns** and **Active Columns** lists for you to make your selections.



19.2 Prospects Report Samples

Reports to Manage Prospects

- This is the **Prospect Listing** report is sorted by **Prospect No.** and includes the City and State for each prospect. This report was generated by using the saved report configuration "City-State".

Prospect Listing

entree.NET Distributor
168 Boston Post Rd
Madison, CT 01902

Prospect No.	Sales No	Status	Company	Contact	Phone	Created	City	State	Last Modified	Converted Date
2	CA	In Process	KiKi Natural Foods	Vikki Smith	2032453999	06/08/2010	East Haven	CT	06/16/2010	
3	CA	Active	Smith & Sons Tavern	Joe Smith	2032453900	06/10/2010	Madison	CT	06/16/2010	
4	AL	Pending	Frank's Family Foods	Frank Capra	2034842367	06/10/2010	North Branford	CT	06/16/2010	
5	CA	Active	Villlage Diner	Nick Avgerinos	2032453999	06/11/2010	Guilford	CT	06/16/2010	
6	AL	Active	Fred's Family Diner	Fred Farigno	2034886278	06/15/2010	North Branford	CT	06/16/2010	
7	CA	Active	Smoochie's Deli	Gary Cyano	2034689975	06/16/2010	East Haven	CT	06/16/2010	

- This example of a **Prospect Guide** report is sorted by **Item Number** and includes **Unit Price**.

Smith & Sons Tavern
168 Boston Post Road
Madison, CT 06512

Prospect Guide

entree.NET Distributor
168 Boston Post Rd
Madison, CT 01902

Seq	Item Number	Description	Class	Brand	Unit Meas.	Pack Size	Unit Price
20	10117	CHICKEN STRIPS BREADED	FROZEN CHICKEN	PARADE	CASE	1/10#	26.88
30	10334	FRIES CRINKLE CUT	FRENCH FRIES	MC CAIN	CASE	6/5#	11.09
2	20100	BEEF GROUND 81/19	BEEF	IBP	CASE	8/10#	1.17
0	20138	ROAST BEEF MARQUE'S PREMIUM	BEEF	MARQUE	CASE	2/12-15#	2.45
10	20414	CHICKEN WINGS	POULTRY	MARSHALL DURBIN	CASE	1/40#	0.88

Chapter 20

Request Quote

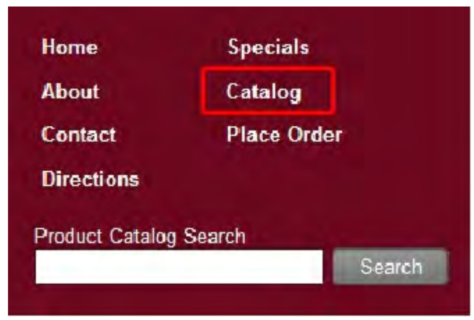
20 Request Quote

The **Request Quote** feature in **entrée.NET** has provided an easy way for visitors to our company website to communicate with us for product quotes. There are occasions when a current customer or a prospective customer would like to get a quote on items in our catalog. Once the visitor to our website completes the simple process detailed below, an email will be sent to us with all the customer information and a list of the items where quotes have been requested.

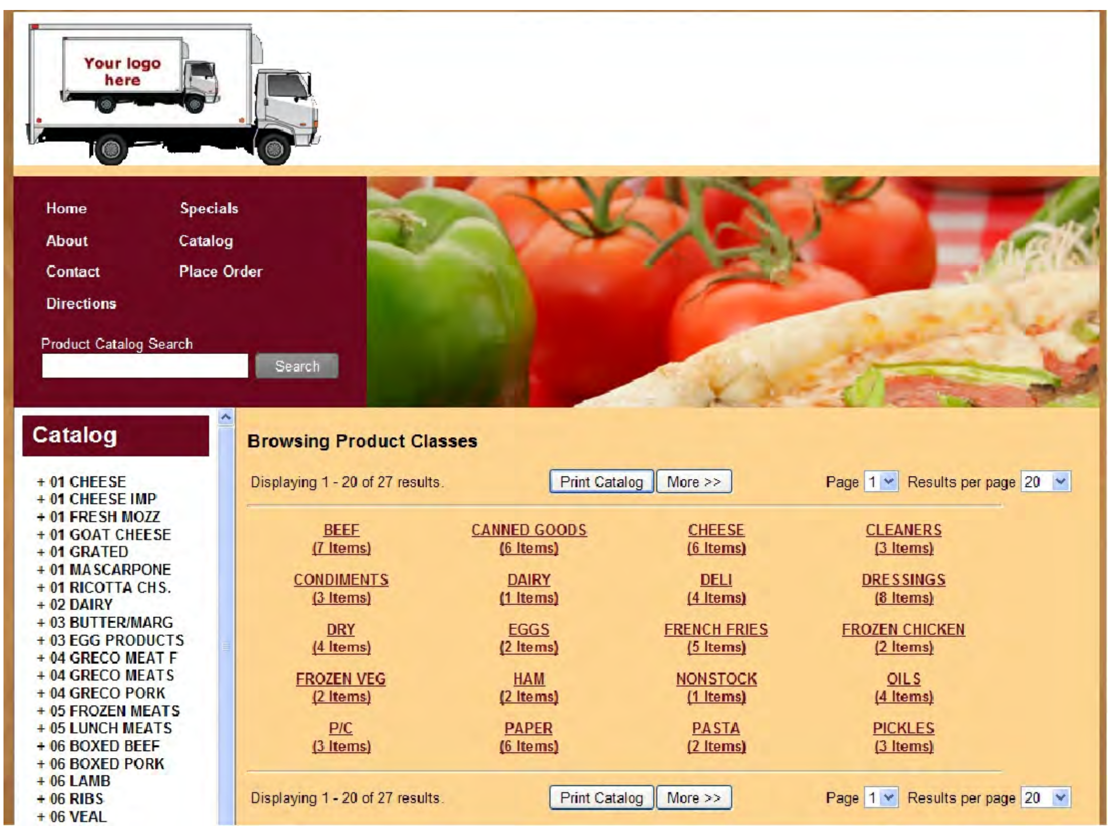
Note Be sure to have your customers enter your name in the **Salesperson** field in the **Request Quote** email form.

How to Request a Quote

1. Click on the **Catalog** link in the website.



2. In the **Browsing Product Classes** section of the page select a **Product Class.**



3. In the **Browsing Product Class:** ***class*** page the item numbers, a Description link, Brand, Pack Size and Unit Meas. are listed for each item in the selected class.

4. Click the **Request Quote** button to add the item to your quote request cart.

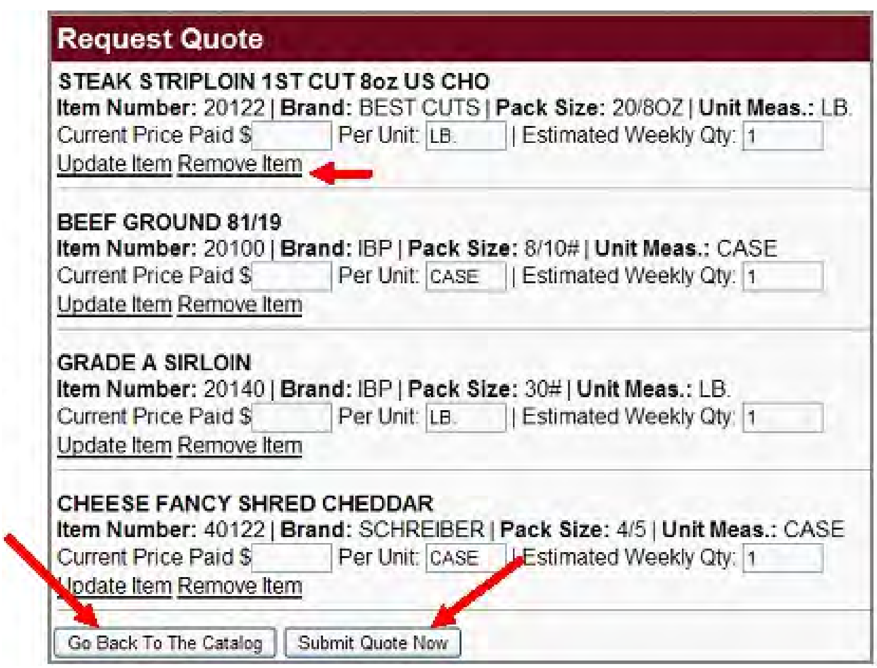
5. The item will be added to the **Request Quote** cart. All the items in this cart will be displayed on the **Request Quote** cart page. Each item in the list has an **Update Item** and **Remove Item** button.

   a. Enter information in the **Current Price Paid** and **Estimated Weekly Qty** fields.

   b. To request a quote on another item click the **Go Back To The Catalog** button at the bottom of the page and repeat the process for the next item.

   c. Once you have added an item to the **Request Quote** cart use the **Edit/Submit Quote** button under the **Catalog** header to return to the cart.

   d. If all the items requiring quotes are in the cart then click the **Submit Quote Now** button and proceed to the **Request Quote** email form.

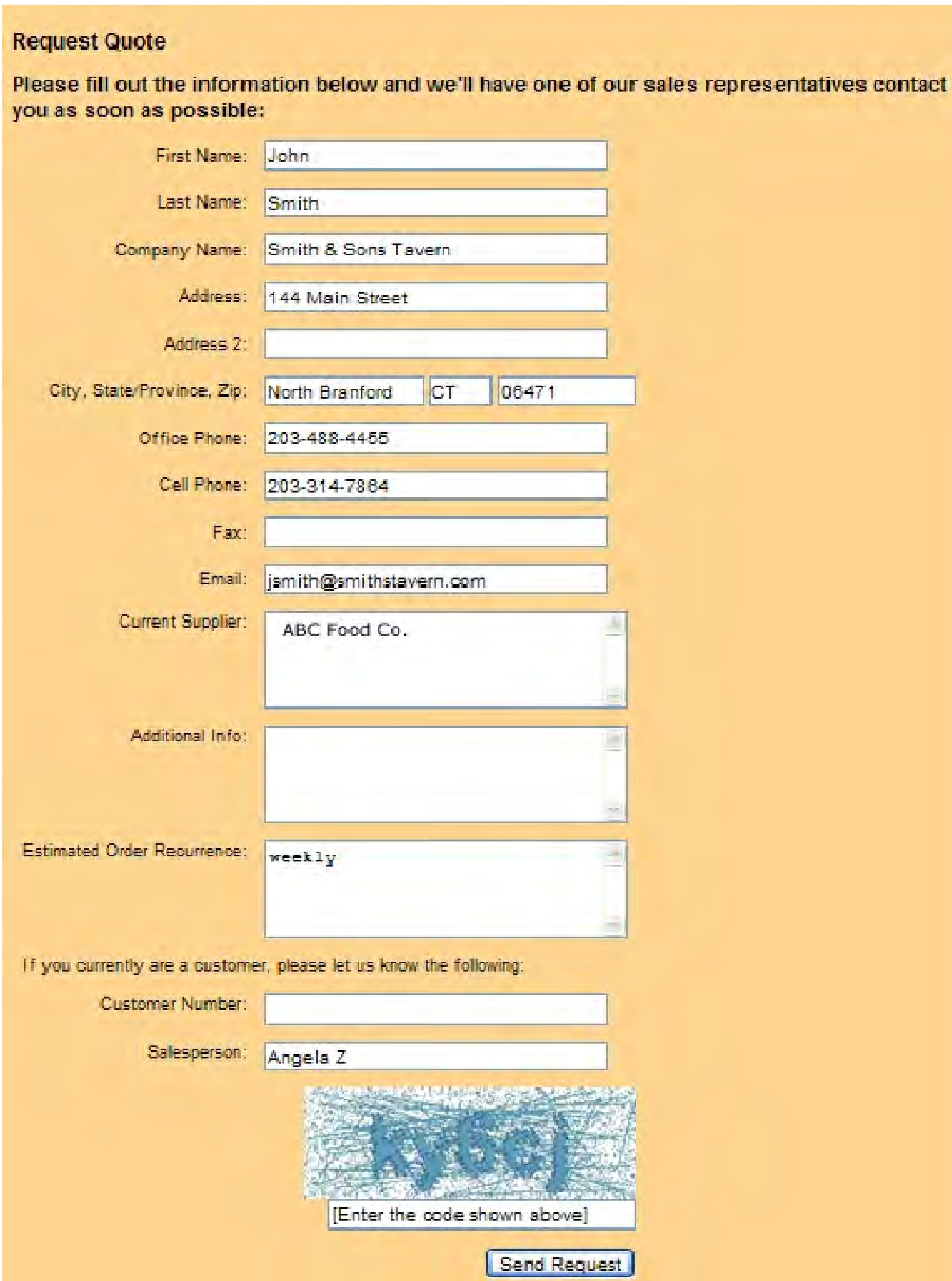


6. Fill in the **Request Quote** email form. An example of the form is displayed below.

7. If you are not a current customer skip the **Customer Number** field.

8. In the text box labeled “Enter the code shown above” at the bottom of the form type the code.

9. Click **Send Request**. An email will be sent to the email address you provided to confirm your request. The distributor will be sent an email with the **Request Quote** information you provided.



Request Quote

Please fill out the information below and we'll have one of our sales representatives contact you as soon as possible:

First Name: John

Last Name: Smith

Company Name: Smith & Sons Tavern

Address: 144 Main Street

Address 2:

City, State/Province, Zip: North Branford | CT | 06471

Office Phone: 203-488-4455

Cell Phone: 203-314-7884

Fax:

Email: jsmith@smithstavern.com

Current Supplier: ABC Food Co.

Additional Info:

Estimated Order Recurrence: weekly

If you currently are a customer, please let us know the following:

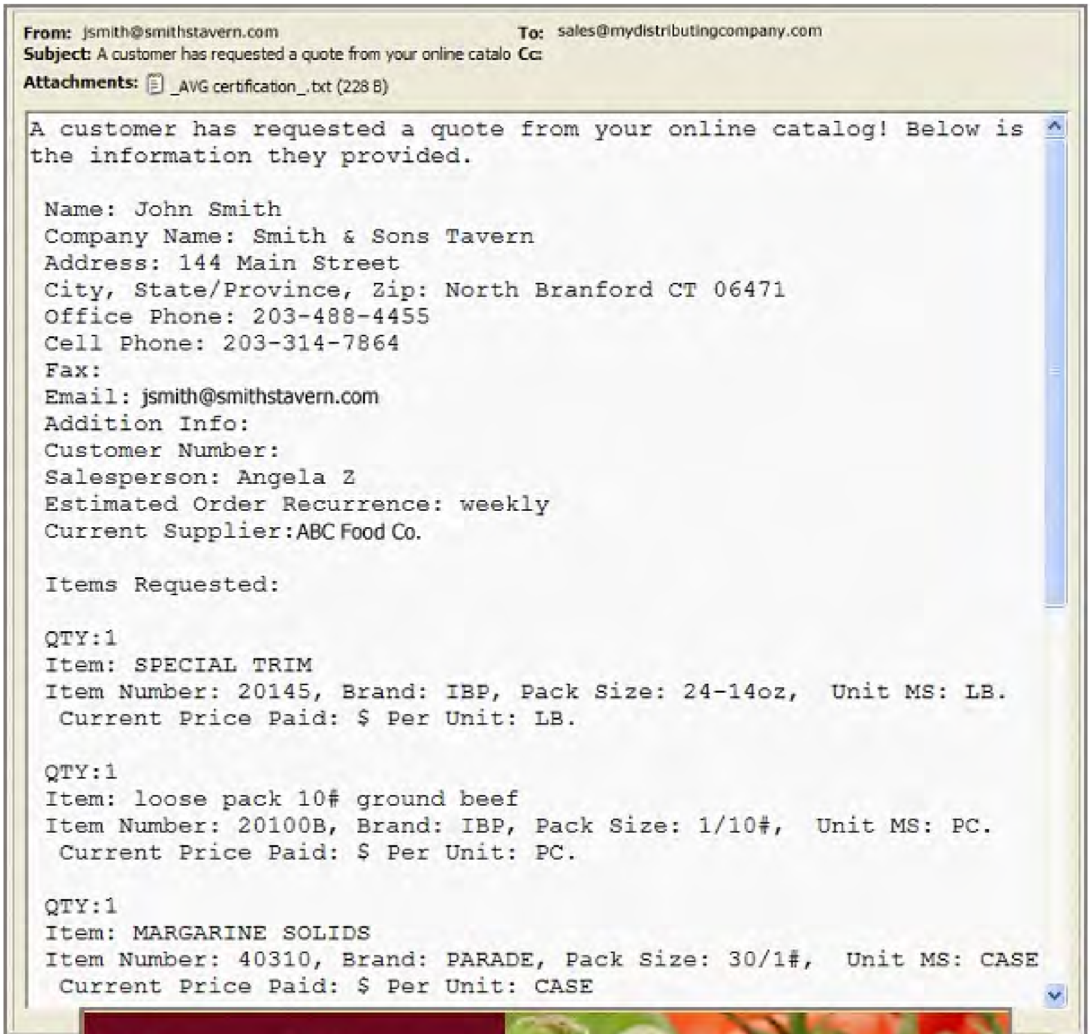
Customer Number:

Salesperson: Angela Z

[Enter the code shown above]

Send Request

Example This is an example of the email that will be sent from the **Request Quote** process.



From: jsmith@smithstavern.com To: sales@mydistributingcompany.com
Subject: A customer has requested a quote from your online catalo Cc:
Attachments: _AVG certification_.txt (228 B)

A customer has requested a quote from your online catalog! Below is the information they provided.

Name: John Smith
Company Name: Smith & Sons Tavern
Address: 144 Main Street
City, State/Province, Zip: North Branford CT 06471
Office Phone: 203-488-4455
Cell Phone: 203-314-7864
Fax:
Email: jsmith@smithstavern.com
Addition Info:
Customer Number:
Salesperson: Angela Z
Estimated Order Recurrence: weekly
Current Supplier:ABC Food Co.

Items Requested:

QTY:1
Item: SPECIAL TRIM
Item Number: 20145, Brand: IBP, Pack Size: 24-14oz, Unit MS: LB.
Current Price Paid: $ Per Unit: LB.

QTY:1
Item: loose pack 10# ground beef
Item Number: 20100B, Brand: IBP, Pack Size: 1/10#, Unit MS: PC.
Current Price Paid: $ Per Unit: PC.

QTY:1
Item: MARGARINE SOLIDS
Item Number: 40310, Brand: PARADE, Pack Size: 30/1#, Unit MS: CASE
Current Price Paid: $ Per Unit: CASE

10. The **Request Quote** process is completed when the thank you message is displayed on the website as shown above.

Chapter 21

Prospects Manager

21 Prospects Manager

The purpose of the “Prospects Manager” is to provide day to day oversight of the assignment and conversion of prospects accounts and processing of price quotes. A common set of tools is provided for both managers and salespeople to prepare quotes for prospects or potential customers. When our System Administrator designates a member of our staff as a Prospects Manager a new username and password will be assigned to you specifically for this role.

Two new tabs have been added to the **entrée.NET** menu to support this feature; **Prospects** and **Reports**. The **Prospects** tab is where you will create and manage prospect accounts. You will also have the ability to assign salespeople to specific prospect accounts. You can create and review all the prospect guides being used for price quotes. The **Reports** tab contains two new reports created to support prospect management, the “Prospect Listing” and “Prospect Guide”.

Prospects need to be managed in order to grow our base of regular customers. There is a process to convert a prospect account to a regular customer account. Any salesperson can initiate this conversion process, but conversion to a customer account can only be completed by the Prospects Manager or the System Administrator. This conversion process will be discussed in more detail later in this chapter.

Note Orders cannot be placed for prospects and they are not included in your customer listing. Each prospect has a “Status” associated with them to indicate their current position in the prospect to customer conversion chain. These statuses are:

Active	Initial state indicating that this is an active prospect.
Pending	Indicates that this prospect is ready to be converted into a customer.
In Process	Indicates that the conversion to a customer is in process and pending confirmation from the main system.
Converted	Indicates that the prospect has been converted to a customer.

21.1 Where Prospects Come From

Where do your prospects come from?

- The Prospects Manager or Salesperson can add prospects into the **entrée.NET** system.

- The website **Request Quote** feature will automatically create new prospects accounts.

New Prospect Accounts from our entrée.NET Website

When our website creates a prospect account automatically from the **Request Quote** process emails are sent to the Prospects Manager. See the **Request Quote** chapter in this guide for more information. As a part of the **Prospects** feature a “new prospect notification” email will also be sent as a part of the automatic assignment of salespeople in the **Request Quote** process. An example of the email follows.

Note **It is important to regularly monitor your emails for notifications from your website.**

```
A customer has requested a quote from your online catalog! Below is the
information they provided.

 Name: Gary Cyano
 Company Name: Smoochie's Deli
 Address: 34 Vista Drive
 City, State/Province, Zip: East Haven CT 06512
 Office Phone: 2034689975
 Cell Phone: 2033148784
 Fax:
 Email: frances@necs.com
 Addition Info:
 Customer Number:
 Salesperson:
 Estimated Order Recurrence: weekly
 Current Supplier:

 Items Requested:

 QTY:1
 Item: HAM FOUR STAR ROUND
 Item Number: 20231, Brand: FOUR STAR, Pack Size: 4/14#AVE,  Unit MS: CASE
  Current Price Paid: $ Per Unit: CASE
```

- The **Request Quote** process has initiated the email notification message above and the creation of the new prospects account in the **Prospects** tab as shown below.

Website | **Prospects** | Reports | About | Sign Out

Create Customer | Create Prospect | Edit/View Prospect | Delete Prospect

Filter: All   Search Mode: (•) Match ( ) Contains

Search

Prospect #	Status	Sales #	Company	Contact	Address 1	City	State	Phone	Fax
3	Active	CA	Smith & Sons Tavern	Joe Smith	168 Boston Post Road	Madison	CT	2032453900	2032453909
5	Active	CA	Village Diner	Nick Avgerinos	11 Whitefield Street	Guilford	CT	2032453999	2032453888
6	Active	AL	Fred's Family Diner	Fred Farigno	222 Foxon Road	North Branford	CT	2034886278	
7	Active	CA	Smoochie's Deli	Gary Cyano	34 Vista Drive	East Haven	CT	2034689975	
4	Pending	AL	Frank's Family Foods	Frank Capra	168 Boston Post Road	North Branford	CT	2034842367	
2	In Process	CA	KiKi Natural Foods	Vikki Smith	1144 Boston Post Road	East Haven	CT	2032453999	2032453997

- Once a prospect account is listed in the **Prospects** tab follow steps 6 – 8 in the **Adding New Prospects** section of the Prospects Tab chapter to complete initial processing. The **Notes** section will contain the notes from the email notification.

Notes

** THIS PROSPECT WAS GENERATED FROM A WEBSITE QUOTE REQUEST **

Prospect was automatically assigned to salesperson #CA

Cell Phone: 203-314-9865

21.2 Prospects Feature Basics

Use the links below for additional information about the Prospects Feature:

- **Prospects Tab Chapter**
- **Prospects Tab Overview**

The **Prospects** tab is where salespeople can create, edit, and delete prospect accounts. Prospect accounts will also be created automatically via our website when a potential customer uses the **Request Quote** feature in the **Catalog** page. Only the designated Prospects Manager or System Administrator is allowed to convert prospects accounts to regular customer accounts.

A salesperson is allowed to edit **one** "prospect guide" per prospect account to use for quoting prices. The prospect guide is very similar to the **Order Guide** feature already provided in the system for customers. Refer to the Order Guides chapter in this guide for more information. The prices in the prospect guide can be edited similar to the price editing feature in a regular customer order.

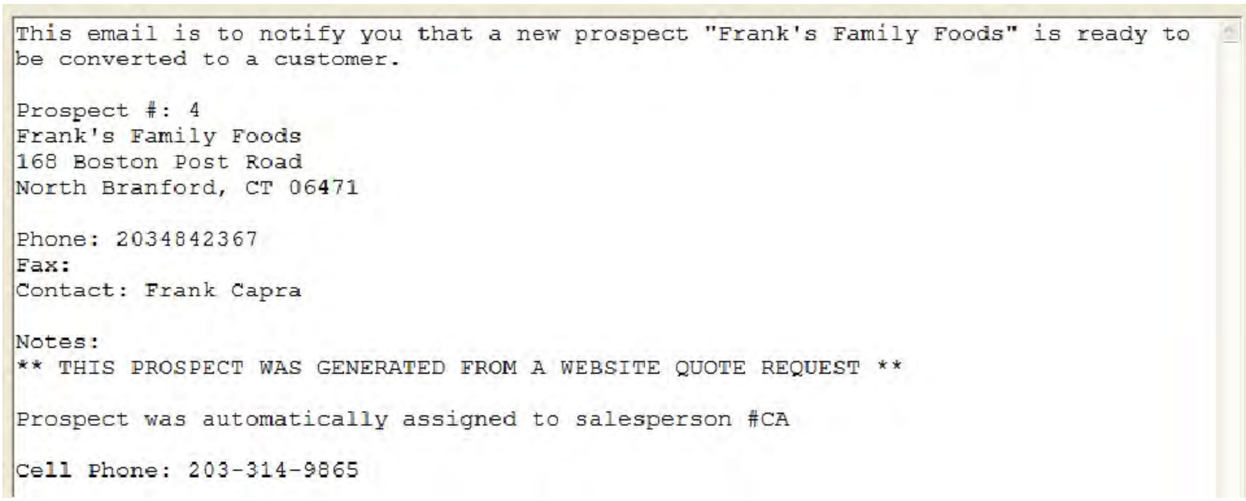
When a prospect account is ready to become a real customer account you will check the "**Ready to Convert**" check box and the status of the prospect will be set to the "Pending".

Salespeople are **not allowed** to make any additional changes to the prospect account at this time. Only a Prospects Manager can continue to change the prospect information and prospect guide until it has been converted to a regular customer account.

- **Adding New Prospects**
- **Edit / View Prospects**
- **Deleting a Prospect**
- **Prospect Guide Overview**
- **Creating a Prospect Guide**
- **Working with Prospect Guides**

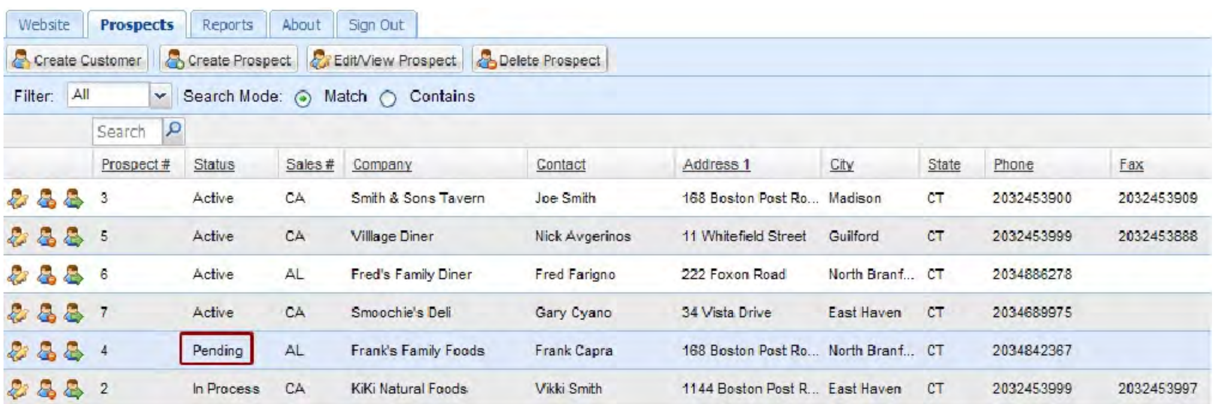
21.3 Conversion of Prospects to Customers for the Prospects Manager

An email notification will be sent to the Prospects Manager or System Administrator when a salesperson checks the **Ready to convert** box for the prospect. A sample portion of an email notification is below.



```
This email is to notify you that a new prospect "Frank's Family Foods" is ready to
be converted to a customer.

Prospect #: 4
Frank's Family Foods
168 Boston Post Road
North Branford, CT 06471

Phone: 2034842367
Fax:
Contact: Frank Capra

Notes:
** THIS PROSPECT WAS GENERATED FROM A WEBSITE QUOTE REQUEST **

Prospect was automatically assigned to salesperson #CA

Cell Phone: 203-314-9865
```

The **Prospects** tab will display a **Status** of “Pending” for a prospect account that is ready for you to finish the conversion process.



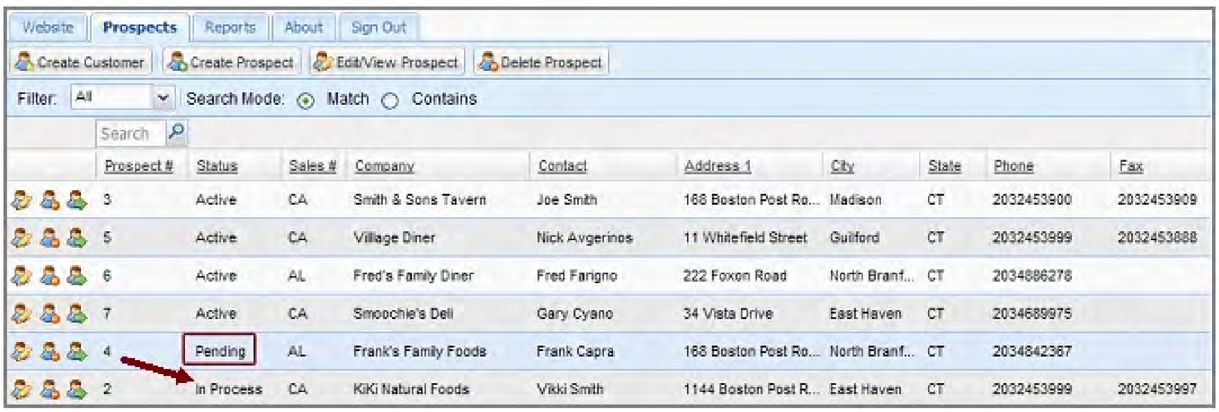
Prospect #	Status	Sales #	Company	Contact	Address 1	City	State	Phone	Fax
3	Active	CA	Smith & Sons Tavern	Joe Smith	168 Boston Post Ro...	Madison	CT	2032453900	2032453909
5	Active	CA	Village Diner	Nick Avgerinos	11 Whitefield Street	Guilford	CT	2032453999	2032453888
6	Active	AL	Fred's Family Diner	Fred Farigno	222 Foxon Road	North Branf...	CT	2034886278	
7	Active	CA	Smoochie's Deli	Gary Cyano	34 Vista Drive	East Haven	CT	2034689975	
4	Pending	AL	Frank's Family Foods	Frank Capra	168 Boston Post Ro...	North Branf...	CT	2034842367	
2	In Process	CA	KiKi Natural Foods	Vikki Smith	1144 Boston Post R...	East Haven	CT	2032453999	2032453997

1. Click the **Prospects** tab.
2. Select and highlight the prospect account who will be converted to a new customer account.
3. Click the **Create Customer** button.
4. The **Create Customer From Prospect** dialog box will display.
5. Displayed in the first line is “Create customer from “**Company**”” with the selected prospect company name. If this is not the correct prospect account click **Cancel** here.
6. In the box for **Customer =** you will assign the new customer’s **entrée Customer #.**
7. Click the check boxes to select these options:

- Create “Standard Order” in **entrée** from items in the prospects order guide.
- Import prices from prospects order guide as the customers “Special price”.

8. Click the **Convert** button.

9. Now the **Prospects** tab will display a **Status** of “In Process”.



10. Click **Sign Out** to close **entrée.NET.**

11. Log in to your main **entrée** system.

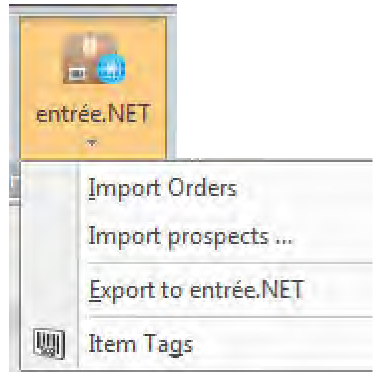
12a. **entrée V3**

Use menu path: **Invoicing > entrée.NET > Import Prospects**

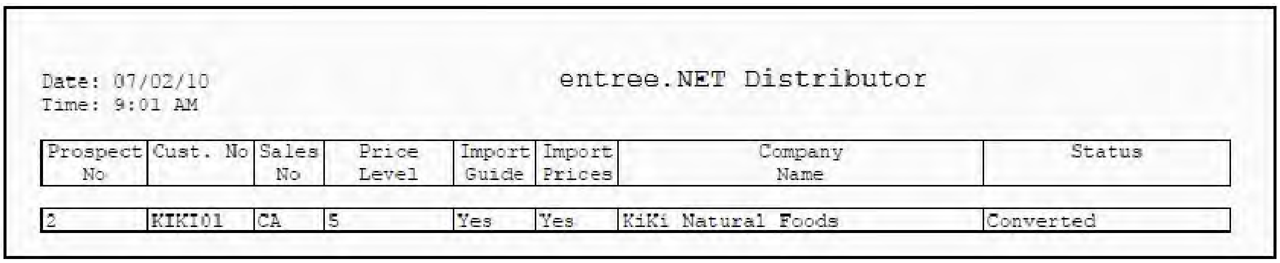
12b. **entrée V4 SQL**

Go to the **Add-Ons** ribbon menu > **entrée.NET** > **Import Prospects**

This will start the import of prospects and the creation of your new customer accounts.



13. The Prospect Import progress bar will display. When the import is completed you will be prompted to print or save a report. This is an example of the report.



entree.NET Distributor

Date: 07/02/10
Time: 9:01 AM

Prospect No	Cust. No	Sales No	Price Level	Import Guide	Import Prices	Company Name	Status
2	KIKI01	CA	5	Yes	Yes	KiKi Natural Foods	Converted

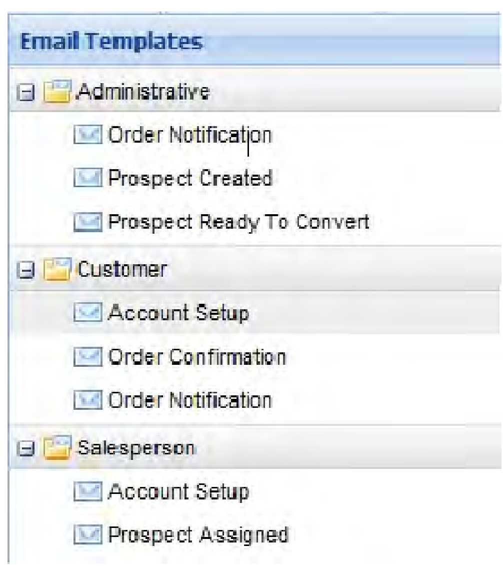
21.4 Prospects Email Templates

New email templates have been added to support the Prospects feature. These new templates can be accessed and updated for your company by the System Administrator once you have implemented the Prospects feature.

Please review the **entrée.NET Settings** chapter of the **entrée.NET Administrator's Guide** guide for more detailed information about email templates.

Go to the **entrée.NET Settings** tab > **Email** button and select the templates you wish to customize.

- Templates under “Administrative” are used for emails sent to distributor or prospect managers.
- Templates under “Customer” are used for emails sent to customers.
- Templates under “Salesperson” are used for emails sent to your salespeople.



Chapter 22

Website Manager

22 Website Manager

Website Manager Overview

If our System Administrator has designated you as a "**Website Manager**" you will be responsible for the day to day updates and overall design of our company's **entrée.NET** website. A login account has been created with a new username and password assigned specifically for this role. The **Website** tab will be displayed in the menu upon log into the system. This chapter is written for companies who purchased the **Website Only** option featuring a website with just the "Catalog" and "Specials" pages, and the **Website and all entrée.NET features** option.

If we have the **Website Only** option our customers can only view your website and do not have the other functions that **entrée.NET** offers, such as entering orders.

You now have the ability to make website changes as required for our business. You can change images, update the content on our "Welcome," "About Us," "Contact," and "Directions" pages. You will be able to automatically post our inventory list and specials, from our NECS **entrée** software, directly to our website, as often as you'd like.

The **Website** tab is composed of two sections which run along the left side of the screen. These include Content, Banner and Colors. Each of these will be described next.

Content Overview

Updating the information in your website is a critical part of keeping your customers current with products, specials, and services provided by your business. If your customers know you frequently post your specials then they will make sure to check your website often to find those deals.

The content of your website is divided into **Blocks**, **Menu** and **Pages** which can contain text, hyperlinks and images. The image below shows color coded arrows indicating these areas of the web page.

Blocks are specific sections of various web pages within your website. The **Blocks** content areas of your website are:

- **Blog** – Allows distributors to post multiple articles or news posts on their website. This feature must be activated in the **Settings** tab by selecting "**Yes**" for the "**Display Website Blog**" option.
- **Featured Vendors** – Posted on your website home page this block allows you to highlight multiple vendors and their products.
- **Latest News** – This block is posted on all of your website's pages in the lower right corner.
- **Featured Item** – Posted on your website home page this block allows you to highlight specials as "featured items".

The **Menu** section of your website currently includes:

- **Specials** – When you check the **"Display on website"** box for an item in the **Specials** page, it will display the item on the Specials web page.

The **Pages** section of your website can include:

- **Home** – The main page of your website and the first page a customer visits.
- **About Us** – Use this page to tell your customers about your company.
- **Contact** – Provides website visitors with contact information for your company including phone numbers for various department and email links.
- **Directions** – Written directions to your office and/or business location(s). Google maps can be embedded into this page.
- **Place Order** – Customers will use this page to place online order using **entrée.NET.**

Note The **Place Order** page is not included in the website for distributors who purchased the **website only** option.

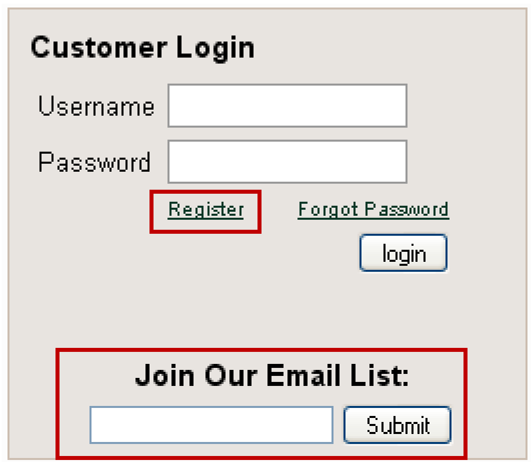
Website Examples

Home Page

A "**Join Our Email List**" option has been added the website **Home** page Customer Login sidebar. Clicking the submit button opens a form for the website visitor to fill out.

The form information is then emailed to you and a new **Prospect** is created and assigned to a salesperson.

The information received from this form will help you generate more leads through your website **Home** page.



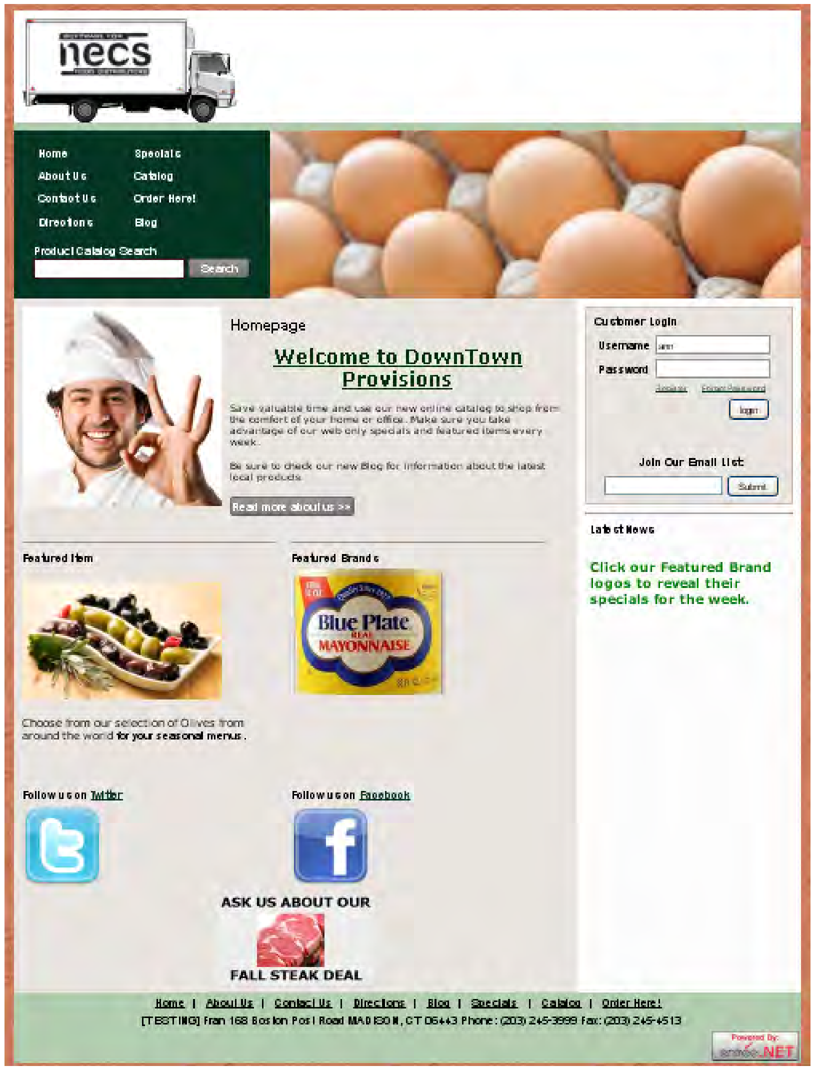
- Or you can add the **"**Join Our Email List" widget for your Constant Contact account to the **Home** page using the **Email List** button.

  Please visit **www.constantcomtact.com** for more information about Constant Contact and creating email marketing campaigns.

* Constant Contact is a registered trademark of CONSTANT CONTACT,INC. Corporation

Example A website Home page displaying entrée.NET features.

- Company Logo.
- Website **Banner Feature** for photo slide show.
- Website **Background** feature.
- Menu with **Blog** link.
- Product Catalog **Search** feature.
- **Register** feature (information follows).
- **Forgot Password** feature.
- Join Our **Email List** feature.
- **Latest News**.
- **Featured Brands** which supports multiple vendors and their logos images that link the customer to the vendor's products in your catalog.
- **Featured Item** with photo.
- **Social Networking** links for Twitter and Facebook.



- **Ads** feature with links to Specials web page, Item Tags, Brand or Class. This content can be positioned at the top or bottom of the website Home page.

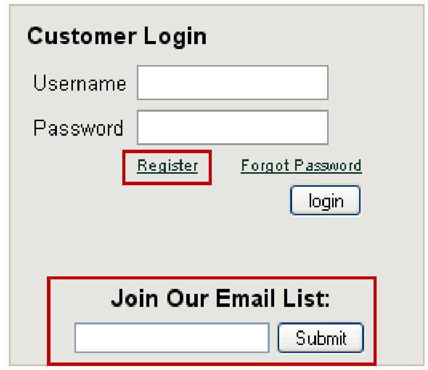
In the example above the **Ad** is the image of steak with the "**Ask us about our Fall Steak Deal**" text at the bottom of the page. The System Administrator will use the **Settings** tab to set up these Ads.

How Website Registration Requests Work

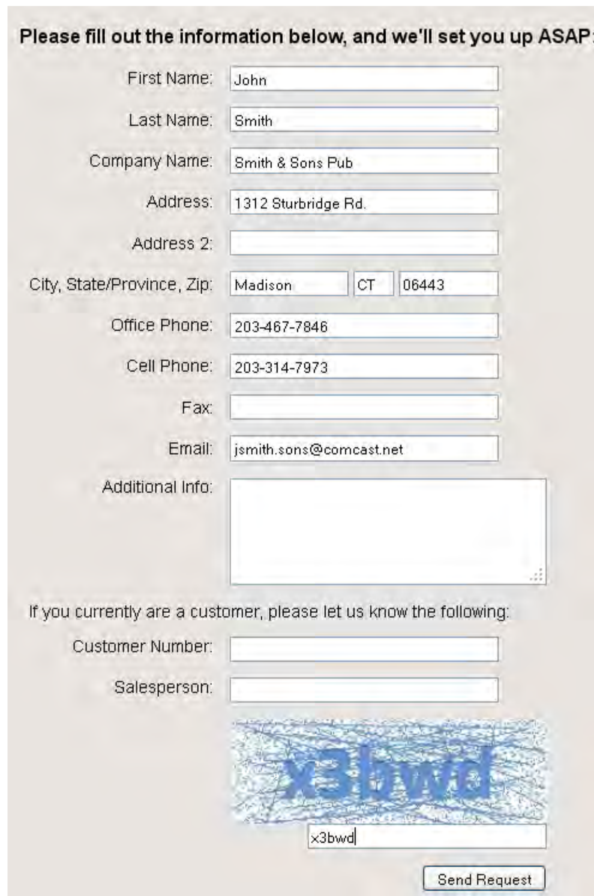
The **Register** button will allow customers to access this online registration form to request an **entrée.NET** account.

Note This feature does <u>not</u> automatically create a user account for the customer to login.

You must manually approve and setup any new customer accounts. See **Creating an Account**.

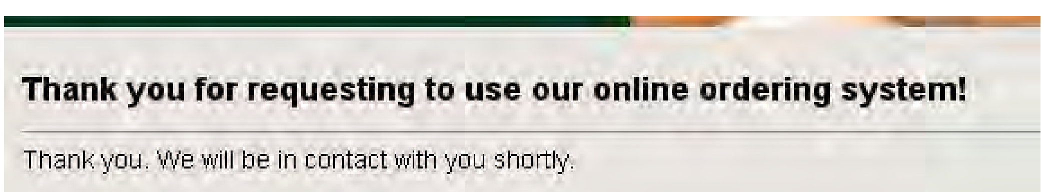


- When the customer clicks the **Register** button they will have an online form to fill out (right).

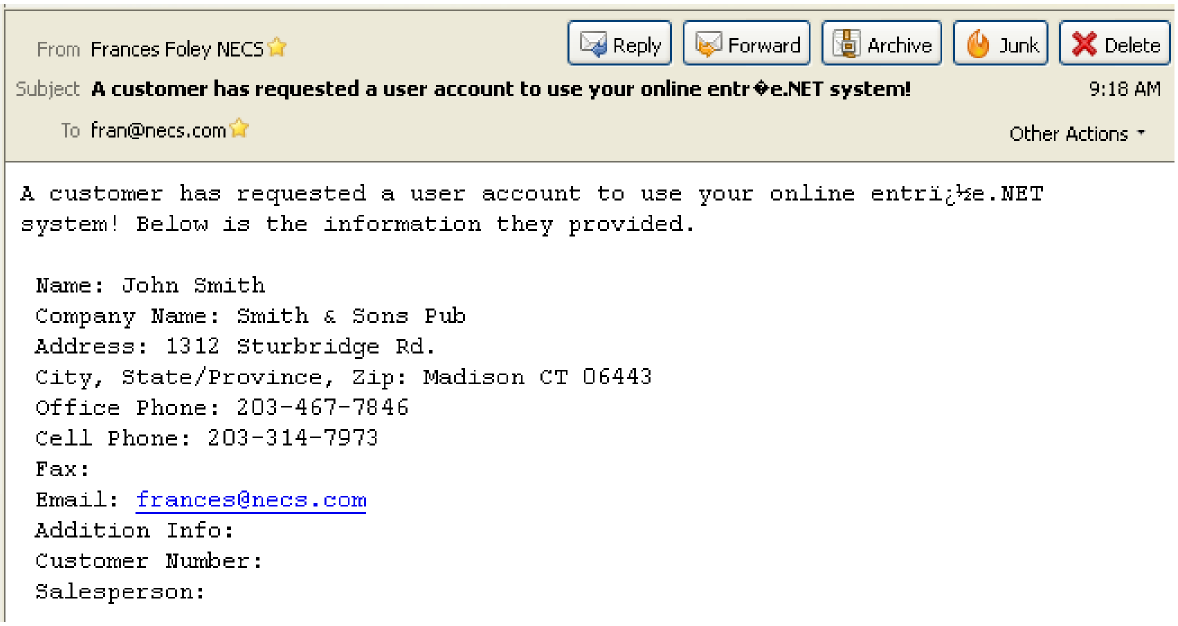


- Once the customer fills in the form, enters the security code displayed and clicks the **Send Request** button the information collected from the registration form is sent to you via an email.

- The customer will see this confirmation message displayed in your website.



- Once the email (see image below) is received from the website **Register** button you can review and process the requests for customer accounts.



A customer has requested a user account to use your online entrï¿½e.NET system! Below is the information they provided.

Name: John Smith
Company Name: Smith & Sons Pub
Address: 1312 Sturbridge Rd.
City, State/Province, Zip: Madison CT 06443
Office Phone: 203-467-7846
Cell Phone: 203-314-7973
Fax:
Email: frances@necs.com
Addition Info:
Customer Number:
Salesperson:

Example **Other Website Pages**

About Us Contact Directions Catalog with images

22.1 Updating Website Contents

The web page update process is basically the same for all your web pages. The information contained in the individual pages will be changed periodically to match your company requirements.

1. Click the **Website** tab, and then click the **Content** button. 

2. Click on the web page name in the Content list on the left.

3. The information currently on the page will display when you click the **Content tab**.

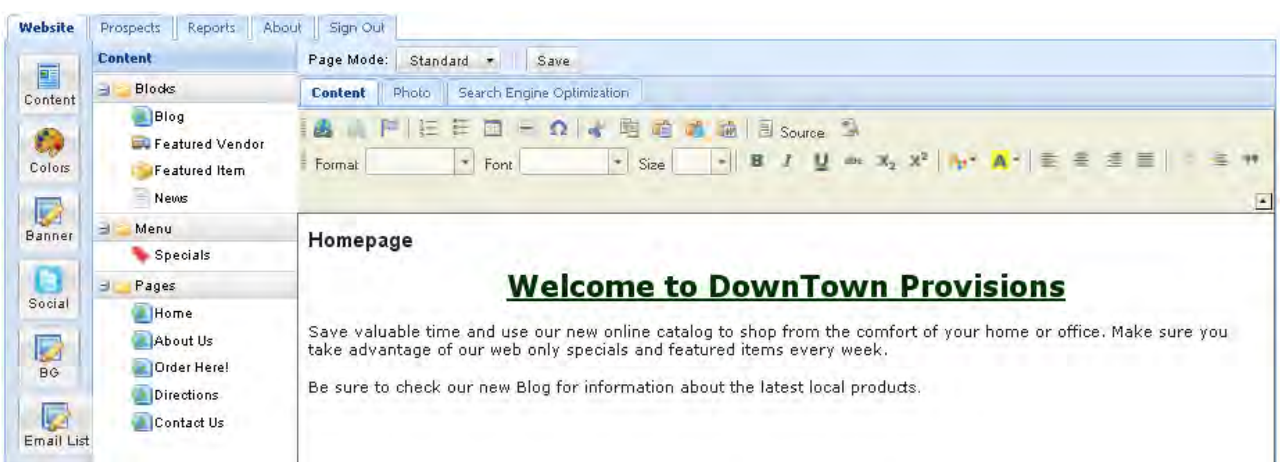
4. Your web page content will initially display with in a **Page Mode** of **Standard**. You can choose to edit your web page content using **Advanced Page Mode** by selecting it from the **Page Mode** drop down list.

- Both **Page Modes** provide you with the same editing tools and the **Search Engine Optimization** tab.

  - **Standard Page Mode –** Will display the stock images loaded into the system in the **Photo** tab. This mode limits you to selecting or uploading a single image.

  - **Advanced Page Mode –** Does not have a **Photo** tab. This page mode allows you to insert multiple images into each web page using the **Image**  tool in the editing tool bar. No stock photos will be displayed in this mode.

Most of the editing tools provided in the **Website** tab you already have used in other software on your computer. To find out what the tool does just roll your cursor onto it and a tool description will pop up. An explanation of each tool can be found later in this chapter.



5. Add your new information and images and remove any obsolete content by using the tools in the tool bar.

6. When your **Content** tab changes are complete, click the **Save** button to update.

If you do not click the **Save** button your changes will **NOT** be saved in your website.

Hot Tip! Website Design Tips

Tip 1: Plan your web pages on paper before you use **entrée.NET** to create them.

Tip 2: Have any images for your website edited and ready to go on your computer.

Tip 3: Pressing the right mouse button while selecting an area of the web page will display a related menu of options.

Tip 4: If you choose to upload and link to documents created in Word, Publisher or other software, convert the documents to .PDF format before you upload them. Using .PDF format will guarantee that all your customers can open and view your documents using the free Adobe Reader software.

Page Mode Editing Tools

Page Mode editing tools may be very familiar to you if you have used any word processing software. These tools will be listed below in their order on the tool bar image above with a brief description of their purpose.

- **Format** – Paragraph format options drop down menu is used for organizing your text and to distinguish different parts of your text.

- **Font** – Use the drop down menu to make a selection from a short list of the fonts best suited for web pages.

- **Size** – Font size drop down menu.

- **Bold** – Make the selected text **bold.**

- **Italic** – Make the selected test *italic*.

- **Underline** – Underline the selected text.

- **Strike Through** – Inserts a ~~strikethrough~~ line into the selected text.

- **Subscript** – Places the index at the bottom of the text like the “2” in B_2.

- **Superscript** – Places the index at the top of the text like the “th” in 4^{th}.

- **Text Color** – Change the color of the selected text.

- **Text Highlight Color** – Change the background color behind the selected text.

- **Left Justify** – Align the selected text to the left.

- **Center Justify** – Center the selected text.

- **Right Justify** – Align the selected text to the right.

- **Block Justify** – Each line of text will have the same length.

- **Decrease Indent** – Moves the selected text left.

- **Increase Indent** – Moves the selected text right.

- **Block Quote** – Use block quotes whenever a quote exceeds four lines of text. This can be use to add direct quotes from your customers into your web page text.

- **Link** – Make the selected text a hyperlink.

- **Unlink** – Remove the hyperlink from the selected text.

- **Anchor** – Create a link to an anchor in the text of your web page. This is used to move web page visitors directly to a selected topic in a web page. The topic anchors are usually listed at the top of the web page and link to the topic farther down the web page.

- **Image** – Insert an image.

- **Numbered List** – Start a numbered list.

- **Bullet list** – Start a list with bullets.

- **Table** – Create a table with a defined number of columns and rows. Tables are used to organize information on a web page.

- **Insert Horizontal Line** – Inserts a divider line (horizontal rule).

- **Insert Special Character** – Inserts symbols and special characters (accented characters, trademark, currency symbol, etc.).

- **Cut** – Cut the highlighted text to the clipboard. (Removes the text from the page and stores it in the clipboard area.)

- **Copy** – Copy the highlighted text to the clipboard.

- **Paste** – Paste the data from your clipboard into the web page.

- **Paste as plain text** – Paste text without it's format on fonts, headings, and hyperlinks.

- **Paste from Word** – Paste content copied from Microsoft Word or similar applications. By using this option you may paste the text from Word ignoring the Font Face definitions or removing Styles definitions.

- **Source** – Switch to source edit mode to edit the HTML code.

- **Show Blocks** – Display where the blocks are in the web page.

Spotlight on Web Design Tools

In this next section some of the most commonly used web page design tools will be examined in more detail including information about working with the Tables, Images, and Special Characters tools.

Using Tables

The Table is used to organize content in your web page. Tables can be used to organize lists of products or create columns for text and images in your web page. Follow these steps to use add a table to a web page:

1. Move the cursor to the desired table location in the web page.
2. Click the **Table** icon.  The **Table Properties** pop up box will display.
3. Enter the number of **Rows** and **Columns** in your table.
4. Enter a number for the **Width** of the table. Select either pixels or percent of the web page from the drop down list. For example; you can enter 50 for Width and select percent and your table will be one half the web page's total width in the browser.
5. Enter the number of pixels for the **Height** of the table.
6. **Headers** – Are used to add titles on your rows and columns. Select from none, First Row, First Column or Both. Then type the title in the header area of the table.
7. **Cell Spacing** – Enter the number of pixels for the space between table cells.
8. **Cell Padding -** Enter the number of pixels for the space between the contents of the cell and the cell wall.
9. **Border size** – Enter a number here for the width in pixels of the table border. Enter a zero if you want no visible border line on the table.
10. **Alignment** – Select from Left, Center or Right for the alignment of the text in the table.
11. **Caption** – Enter the caption you would like to appear above the table.
12. **Summary** – Enter a summary of the information in the table.
13. Click **OK**.

Table Properties

The **Table Properties** dialog box used to create the driving directions table.

The table created using the table properties in the image on the left.

The Caption is displayed above the table.

The table has a 1 pixel border with 4 rows and 2 columns.

Directions for training session on May 28th 2010.

From the North	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae, nulla.
From the South	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae, nulla. Aenean dictum lacinia tortor.
From the East	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae, nulla. Aenean dictum lacinia tortor. Nunc iaculis, nibh non iaculis aliquam, orci felis euismod neque,
From the West	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae, nulla.

Edit an existing table

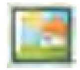
You can view and change its properties by right-clicking the table with your mouse. Select **Table Properties** from the list. When the **Table Properties** pop up box displays make your modifications and click **OK**.

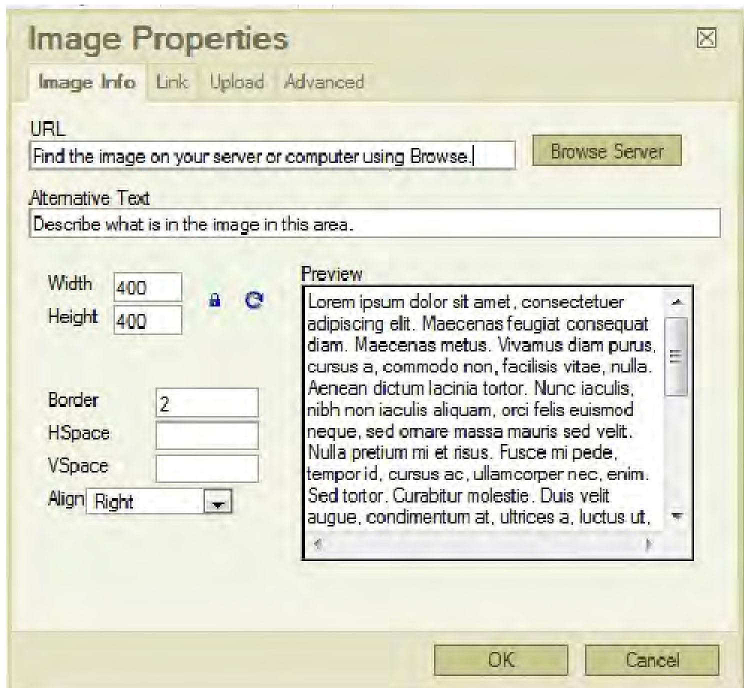
Delete a table

Right-click on the table with your mouse and select **Delete Table**.

Note Not all of the options are required to build a table. You have to fill only rows and columns. The remaining fields are optional and you may use them depending on your needs.

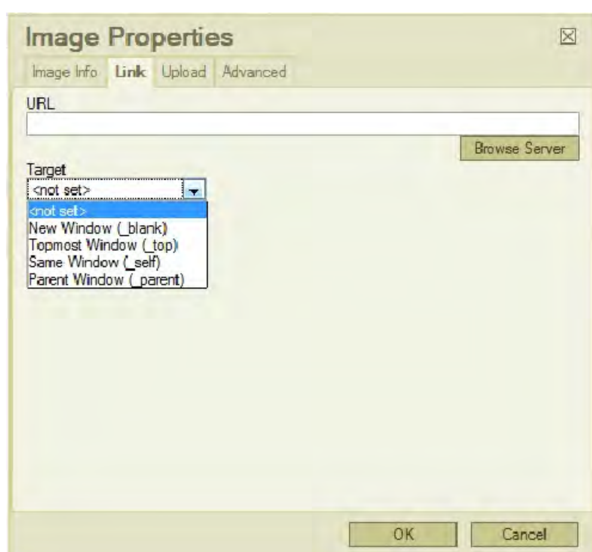
How to insert an image using the Image Tool

1. Move the cursor to the location for the image.
2. Click the **Image** icon  and the Image Properties pop up box will display.
3. Click on the **Image Info** tab.
4. **URL -** Click the **Browse Server** button and locate the image on your server or computer.
5. **Alternative Text –** Type a name or description of the image here.
6. **Width / Height –** Enter a number in pixels to set these image properties.
7. **Border –** If you would like a border line around the image enter the border width in pixels here.
8. **HSpace -** Enter a number in pixels to set the horizontal space between the image and surrounding text.
9. **VSpace -** Enter a number in pixels to set the space above and below the image.
10. **Align –** Select from Right, Center and Left for the image alignment.
11. Click **OK** when done.



How to use an image as a link

1. Complete the **Image Info** process above or open the **Image Properties** of an existing image.
2. Select the **Link** tab in the **Image Properties** pop up box.
3. **URL -** Click the **Browse Server** button and locate the web page you would like to link to or type the URL of the desired website or web page.
4. **Target –** Choose from the drop down list where you want this new link to open in the browser. Select from New Window, Topmost Window, Same Window, Parent Window or not set.
5. Click **OK.**



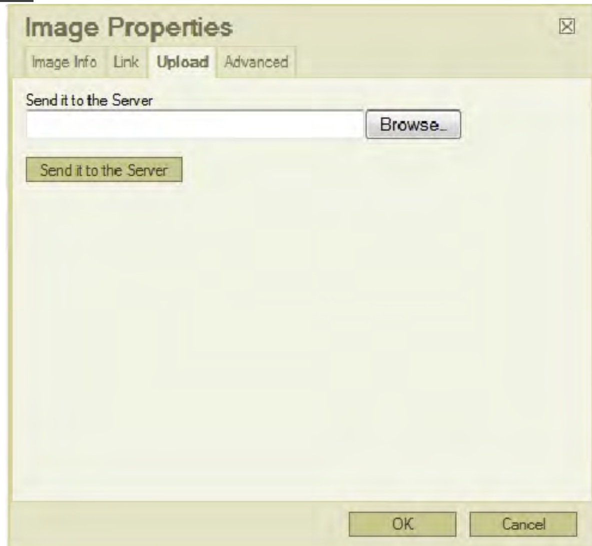
How to upload an image to your server

1. Select the **Upload** tab in the **Image Properties** pop up box.

2. Click the **Browse** button and locate the image on your computer.

3. Click **Send it to Server.**

4. Click **OK.**



How to insert special characters

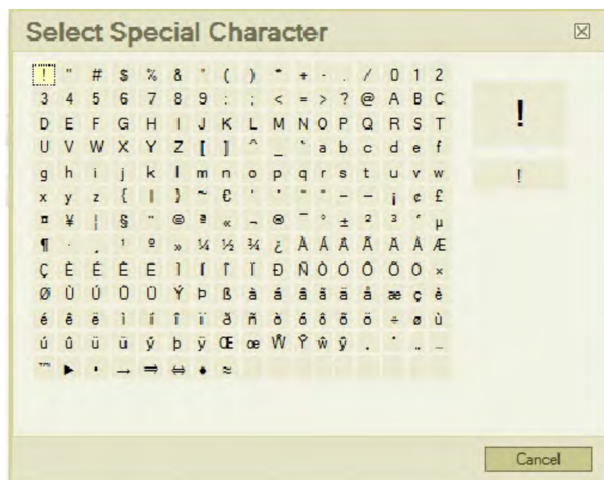
The Select Special Characters tool is used to insert characters into your web page text that are not available on your computer keyboard. Follow these steps to use this tool:

1. Move the cursor to the desired location in the text.

2. Click the **Insert Specials Characters** icon. 

3. The Select Special Characters pop up box will display.

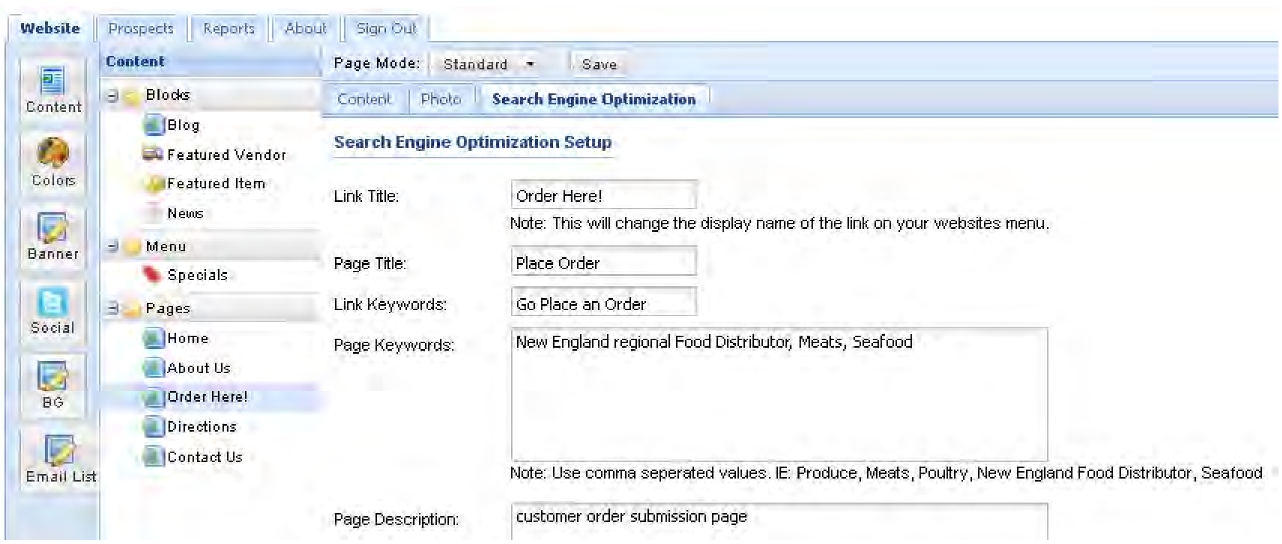
4. Click on the character and it will be inserted in your web page.



22.2 Website SEO

Search Engine Optimization (SEO)

Make sure that your business is found when people are searching the Internet. A **Search Engine Optimization** (SEO) tab has been added to the **Website** feature to give you control over the keywords used by the major search engines. The SEO Setup process will be the same for all of your web pages. Only the keywords you add to each page will change to reflect the web page content. There are 5 areas where you will enter SEO related information:



- **Link Title**: The title the link for that page will display in the website menu.

Note If the current **Link Title** is OK, then you can bypass this value.

- **Page Title**: The title of the web page that will display when viewed in a customer's browser.

- **Link Keywords**: The text that will display when the mouse rolls over the **Link Title** in the menu.

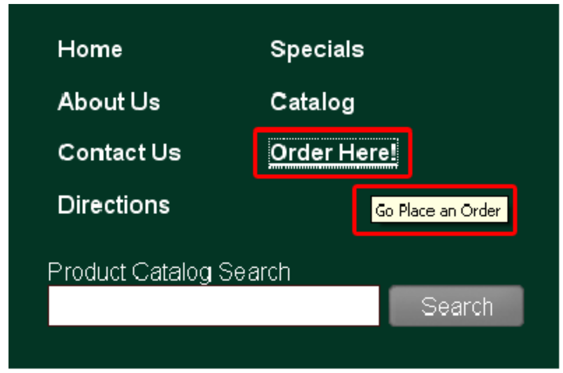
- **Page Keywords**: This is the keyword list search engines will use in reference to your web page. These keywords help to determine how quickly your web page is found.

- **Page Description**: A description of the purpose of the web page and what it offers to the customer.

Below is an example of an SEO Setup for the Place Orders web page. Once you fill in your SEO information, click **Save**. You will fill out the SEO Setup information for all of the pages in your website. Be sure to save each web page once you make your changes.

Hot Tip! Periodically become a customer and visit search engines to input your keywords and phrases. Then see what page of the search engine results your business is found. If you are not on page 1 or 2 you need to fine tune your SEO Setup information.

An example of the website menu showing the **Link Title** and **Link Keywords** (displayed on mouse roll over) from our sample SEO Setup.



22.3 Website Photos

To add photos to your website use the **Photo** tab in **Standard Mode** to add either a stock images or upload your own image from your computer.

1. Click the **Website** tab, and then click the **Content** button. 

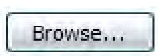
2. Click on the **Page** name in the Content list on the left.

3. Click the **Photo** tab.

4. The **Photo** tab will display the stock images available to you and the upload dialog.

5. Click the desired stock image to select it. The displayed image will update.

6. Or if you would like to upload an image from your computer, the supported image formats are JPG, JPEG, GIF and PNG.

7. Click the **Browse** 

button and then the **Open** dialog box will display.

8. Locate the desired image file on your computer, click on the image file to select it.
9. Click the **Open** 

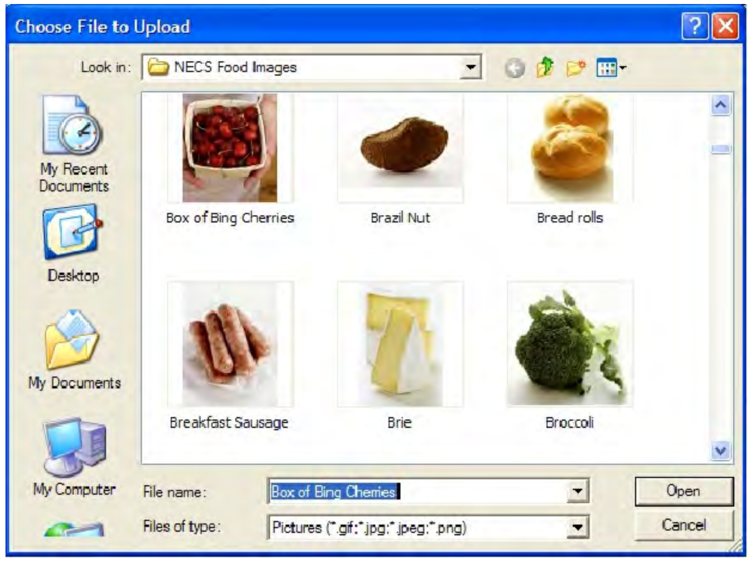
button.
10. Click the **Upload** 

button.

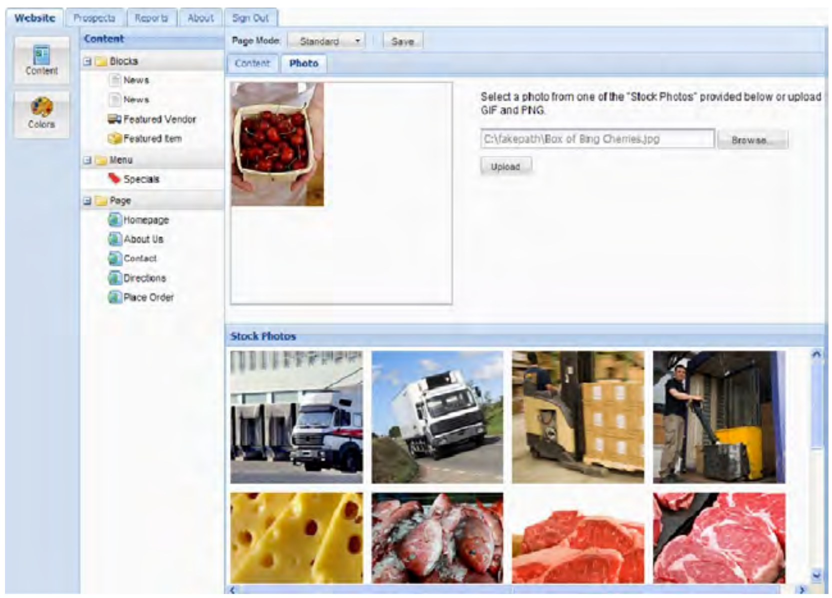
11. The image file will now be uploaded and display in the image area.

12. When your selection is complete, click the **Save** button.

The **Open** dialog box used to find images on your computer for upload to a web page.



The image is now in the **Photo** tab page after being uploaded.



The Home page of the website with the new photo.

22.4 Website Colors

In addition to changing your content, you have the option to change the colors used for the text and the 4 background areas of your web pages. The color scheme you select here will be applied to all the pages in your website.

1. Click the **Website** tab.

2. Click the **Colors** button.

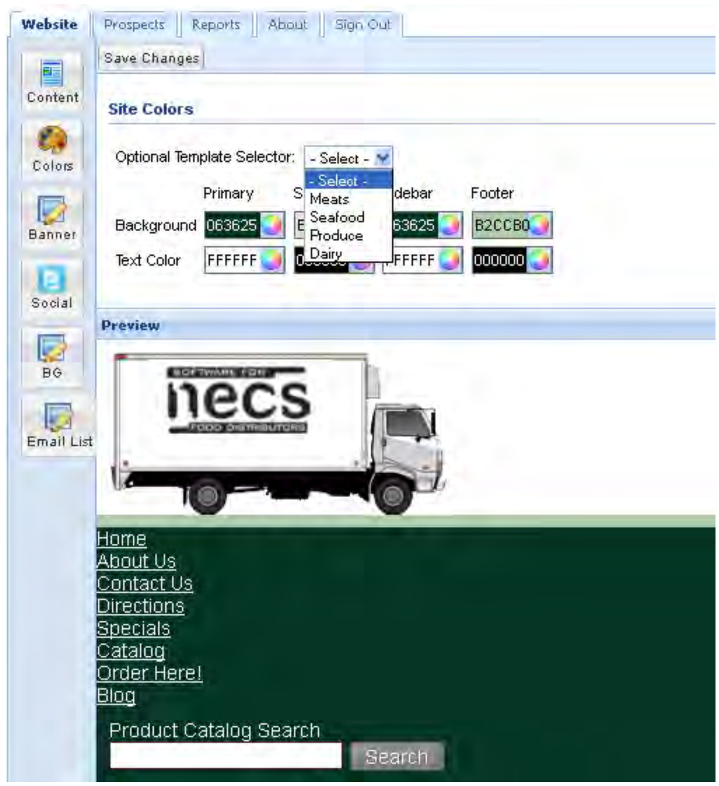
3. Use the **Site Colors** section to select colors from the drop down palettes or if you have specific colors that your company uses, your can enter the RGB values for the colors in the box. The RGB values are displayed in the color box after you select a color from the palette.

   Or use the "**Optional Template Selector**" drop down list to select a website color scheme from four pre-defined styles as shown in the image below.

4. In the **Palette** the location of the cross hair is the color that is selected. Use the scroll bar on the right to change the intensity of the current color palette.

5. The **Home** page will be displayed in the **Preview** section below. As you change the colors of the various page elements the display will update and show you the new color scheme.

6. When your color changes are complete, click the **Save Changes** button to update your website.



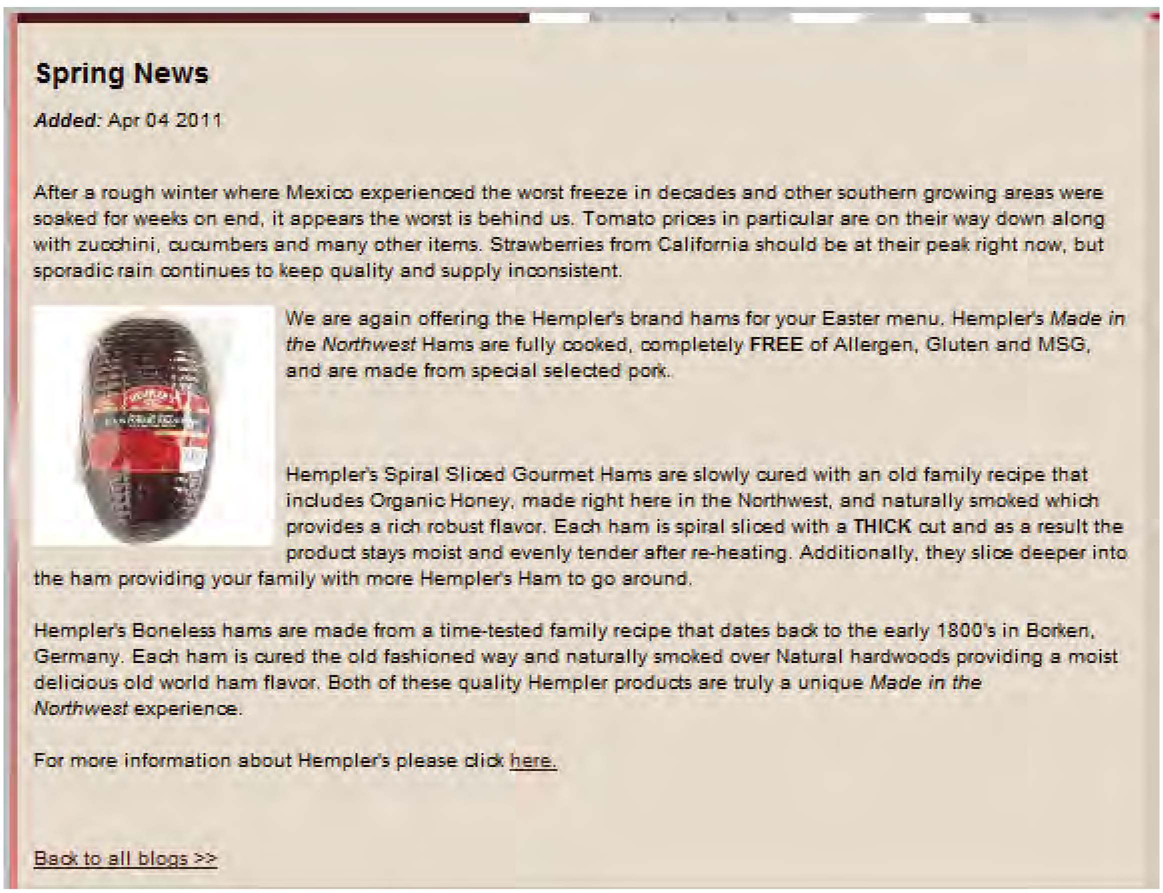
22.5 Website Blocks

Updating the Blog Block

The **Blog** feature allow distributors to post multiple articles or news posts on their website. **Blog** content is managed by the administrator or by the designated website manager. The content entered into the **Blog** block will be displayed in the **Blog** page of your website. To activate the **Blog** feature:

1. Click the **Settings** tab
2. Click the **Options** icon.
3. Scroll down to the **Website** section.
4. Find "**Display Website Blog"** and select "**Yes**".
5. The **Blog** link will now be displayed in the main menu of your website as seen in the image below.
6. Now you are ready to add content to your **Blog**.

Example **The Blog article in the website.**



Spring News

Added: Apr 04 2011

After a rough winter where Mexico experienced the worst freeze in decades and other southern growing areas were soaked for weeks on end, it appears the worst is behind us. Tomato prices in particular are on their way down along with zucchini, cucumbers and many other items. Strawberries from California should be at their peak right now, but sporadic rain continues to keep quality and supply inconsistent.

We are again offering the Hempler's brand hams for your Easter menu. Hempler's *Made in the Northwest* Hams are fully cooked, completely **FREE** of Allergen, Gluten and MSG, and are made from special selected pork.

Hempler's Spiral Sliced Gourmet Hams are slowly cured with an old family recipe that includes Organic Honey, made right here in the Northwest, and naturally smoked which provides a rich robust flavor. Each ham is spiral sliced with a **THICK** cut and as a result the product stays moist and evenly tender after re-heating. Additionally, they slice deeper into the ham providing your family with more Hempler's Ham to go around.

Hempler's Boneless hams are made from a time-tested family recipe that dates back to the early 1800's in Borken, Germany. Each ham is cured the old fashioned way and naturally smoked over Natural hardwoods providing a moist delicious old world ham flavor. Both of these quality Hempler products are truly a unique *Made in the Northwest* experience.

For more information about Hempler's please click here.

Back to all blogs >>

How to Add a Post to Your Blog

1. Click the **Website** tab.

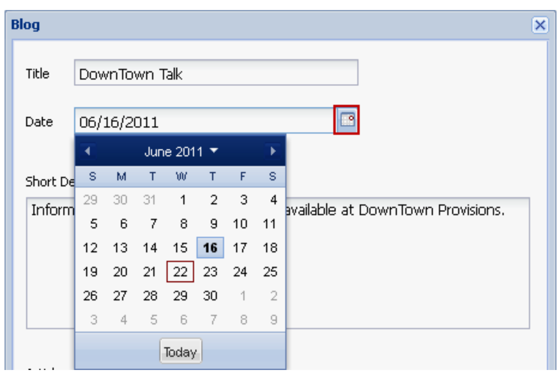
2. In the **Content** menu under the **Blocks** section click **Blog**.

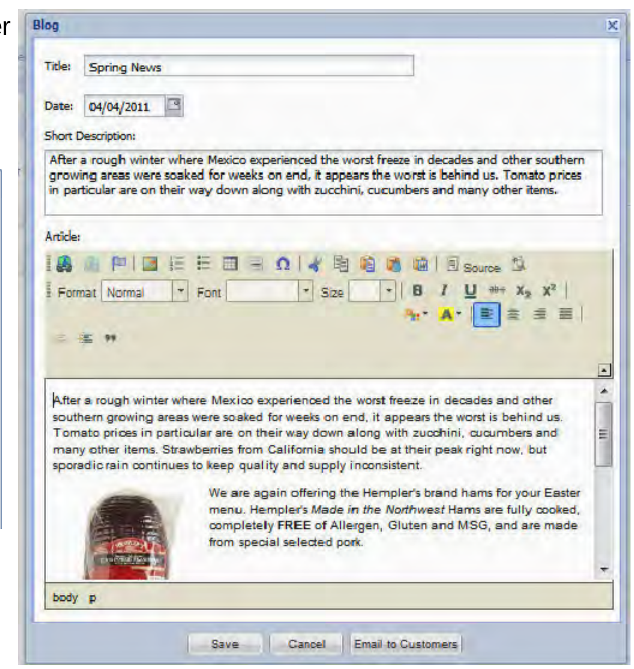
3. Click the **Add New Blog** button.

4. The **Blog** dialog box will be displayed.

5. Enter a **Title** for the blog entry. This title will be displayed in the Blog page of the website.

6. Enter a **Date** for the blog entry. You can either click the calendar icon (as seen in the image below) to select a date or type a date in the text box.





7. Enter a **Short Description**. This description text will be displayed in the Blog entry of your the website.

8. Use the website editing tools to add an image and format the content.

9. The **Article** section is where you will enter the complete blog entry. You can include whatever information you would like to share with your customers.

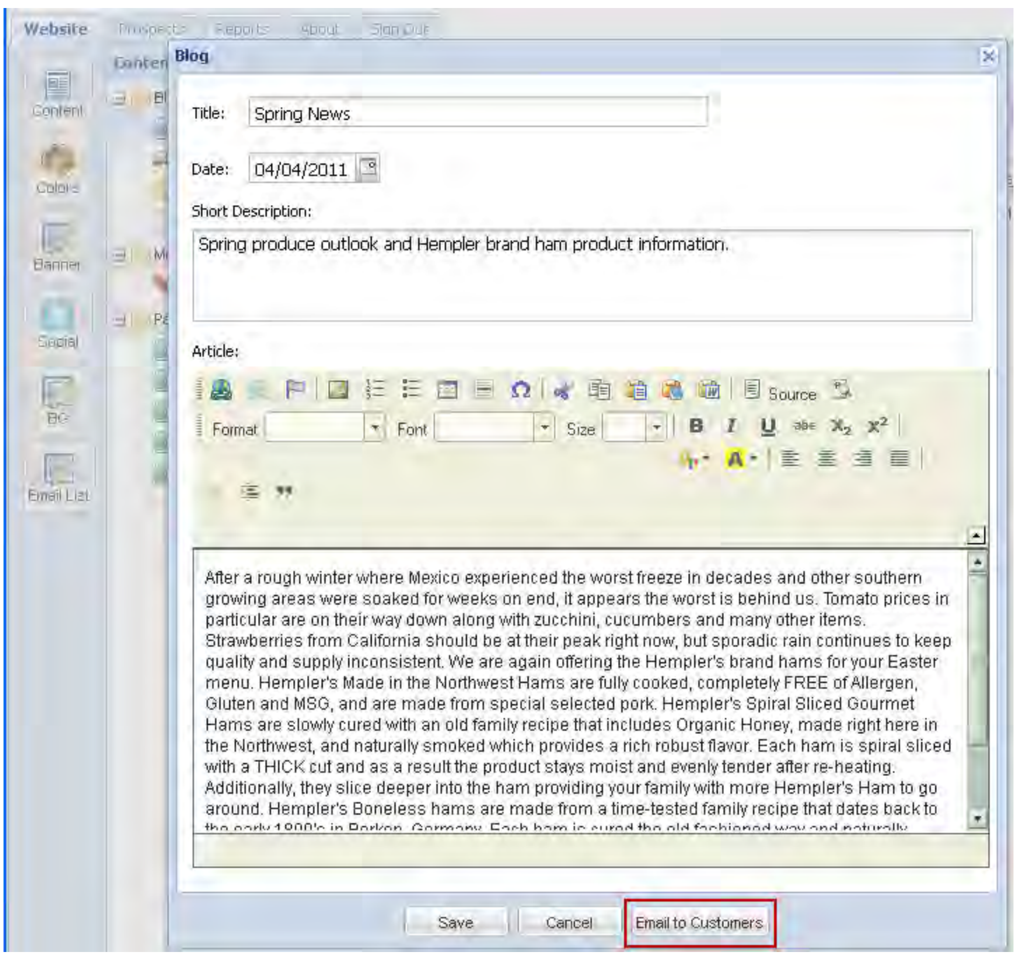
10. When you have finished editing your blog entry click the **Save** button. Now it will be added to the **Blog** page of your website.

Managing Blog Entries

- Use the **Edit** button to change the text in an existing blog entry.
- Use the **Delete** button to remove a blog entry from the website.

Email Blog Entry to All Customers

1. Click the **Website** tab.
2. In the **Content** menu under the **Blocks** section click **Blog**.
3. Select the desired blog entry and click the **Edit** button.



4. When the Blog edit dialog box opens click the "**Email to Customers**" button at the bottom of the window.

5. The **Email Blog to Customers** dialog box will display. The default Recipient value is **All Customers**.

6. Edit the **Email Subject** and **Email Body** text if required.

7. Click the **Send** button. All your customers with email addresses in their [entrée.NET](#) accounts will be sent the email.

Updating the News Block

The content entered into the **News** block will be displayed on all the pages of your website in the **Latest News** section. Use the **News** block to supplement company communications with your customers. Topics concerning time sensitive ordering dates, product announcements, news about your company can be shared. Once the **News** block has been updated it will be displayed in your website instantaneously. To update the **News** block follow these steps:

1. Click the **Website** tab, and then click the **Content** button. 

2. Click on the **News** block in the content list on the left.

3. The information currently in the block will display under the **Content** tab.

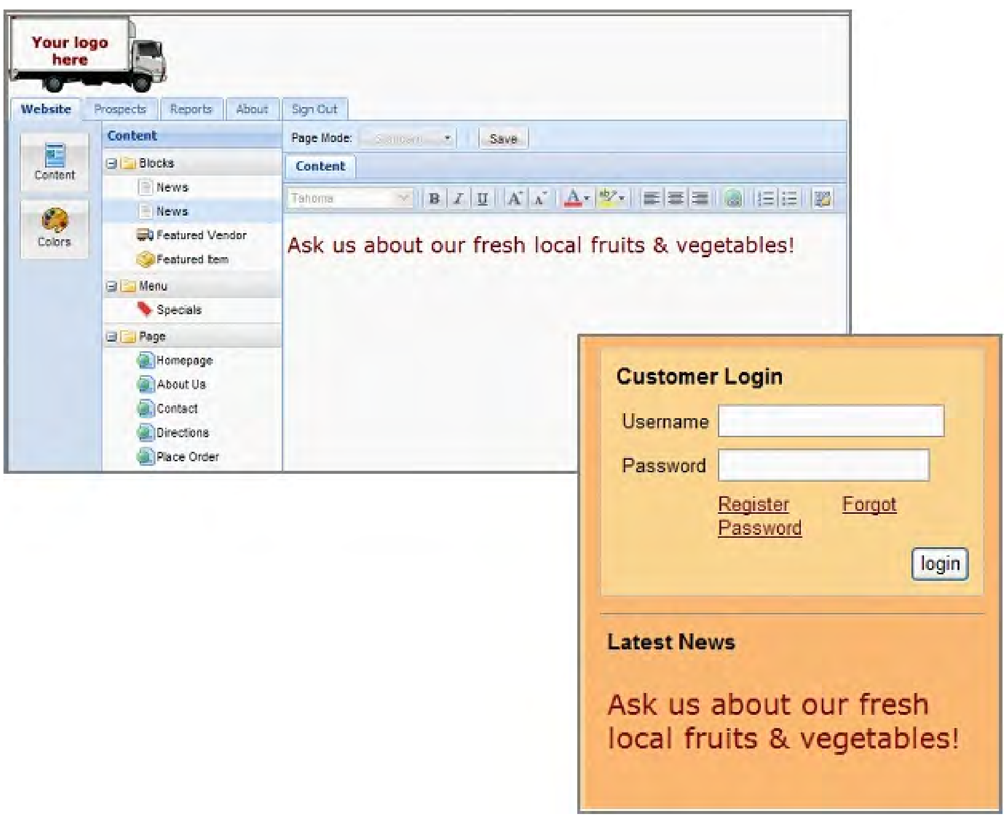
4. Add your new information and remove any obsolete information.

5. Use the tools discussed previously in this chapter to change the text color, font, highlight text, change text size or whatever you wish.
6. When your changes are complete, click the **Save** button to save your changes and update the **Latest News** your website.

Example

Back: The **News** block as it looks in the **Content** tab when you are editing your news.

Front: The **Latest News** section as seen on all the web pages in your website. The purple headline has been highlighted with white to make it more prominent.

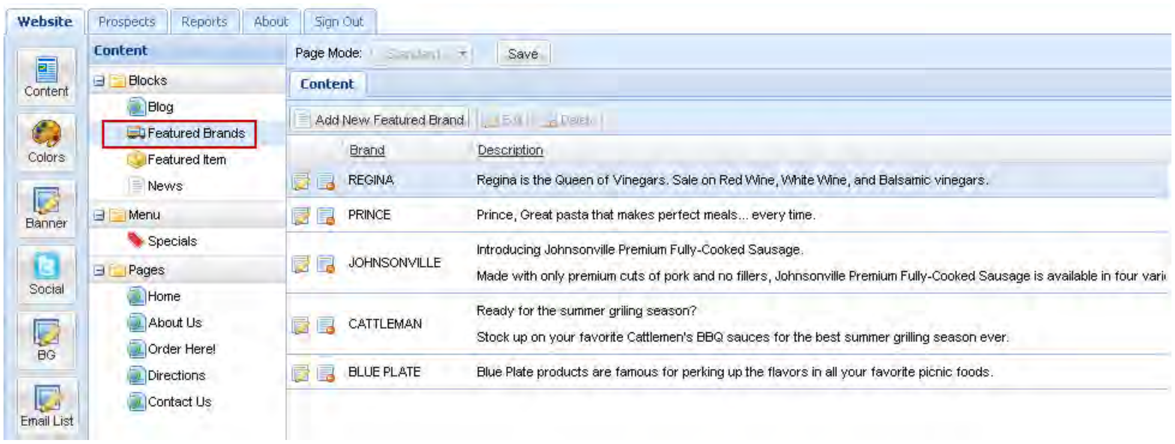


Updating Featured Brands

The "Featured Brands" website feature (formerly called "Featured Vendors") is located in the **entrée.NET Website** tab and now allows you to define multiple brands to be highlight in the **Featured Brands** block of your website home page in a rotating slide show and in the bottom of the customer's shopping cart. The System Administrator can choose to enable that option in their **Settings** tab. The Website Manager can add text, a picture or logo representing the brand and / or their products to the block information.

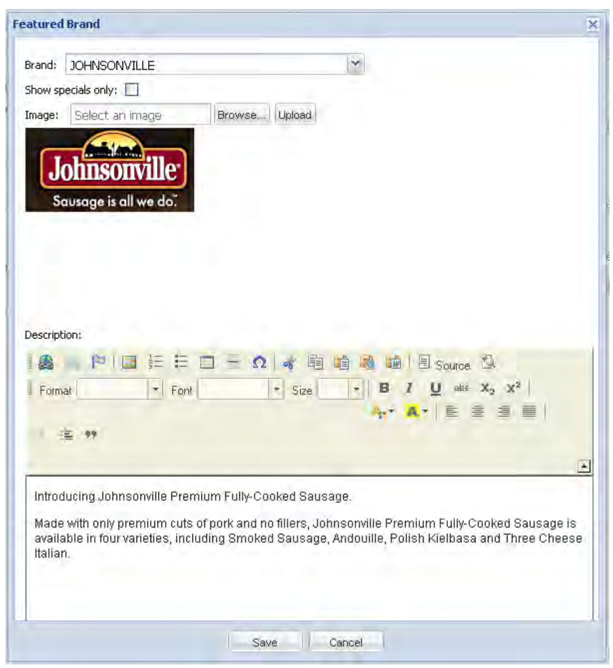
Note The Website tab in **entrée.NET** is now enabled for those distributors who have not purchased the website option. This will provide you with access to the Featured Brands editor so you can use this feature for marketing. All the other Website options will still be disabled.

Note You must first define your Brands in Brand Maintenance in the main **entrée** system and then run the data export to get the information in **entrée.NET.**



- **Follow these steps to control the content in the Featured Brands block.**

1. Click the **Website** tab. In the **Content** list click on **Featured Brands**.
2. The **Featured Brands** screen will display all the brands currently in the block (above).
3. Use the **Edit** and **Delete** buttons to manage your current brands.
4. Click the **Add New Featured Brand** button to open the **Featured Brand** dialog box (right).



5. Select a **Brand** from the drop down list of from all the Brands defined in your main **entrée** system.

6. **Show specials only –** Check this option to only display the brand's specials when the brand image is clicked on the Home page. If not checked all the brand's products in your catalog will be listed.

7. **Image: Browse**, select an image file on your computer and **Upload** a brand image that will be displayed in the home page slide show and used as the link.

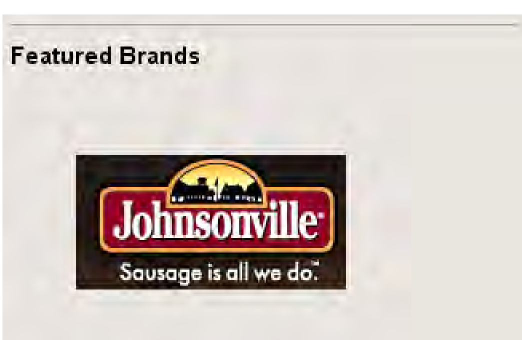
- **Upload –** To upload an image follow steps 15 – 22 in Updating the Featured Item Block section on the last page of this chapter.

8. **Description:** Enter product or specials information. This text will be used for **Website SEO** and will **not** be displayed.

9. Click the **Save** button and your website **Featured Brands** block will be updated. Below are examples of the Featured Brands block as the slides change to to show different brands.

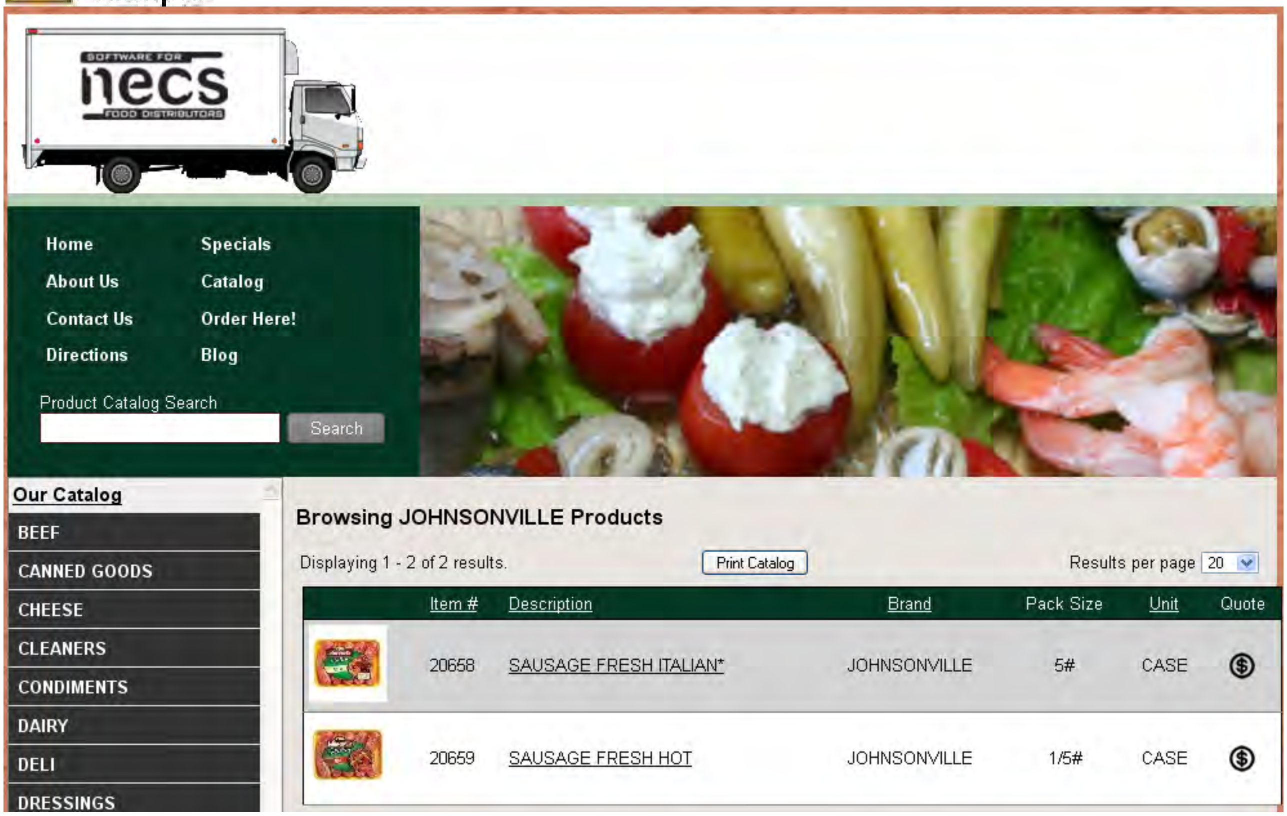
- When your customers mouse over the **Featured Brands** area the slide controls (outlined in red) will display so they can view all your Featured Brands at their own pace.

- When the customer clicks the **Shop Now** link in the shopping cart area they will be brought to the **Catalog** with a list of all the products for that brand.



When a vendor's logo is clicked in the **Featured Brands** block on the Home page the customer is brought to the Catalog web page with a listing of their products as shown in the image below.

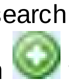
Example



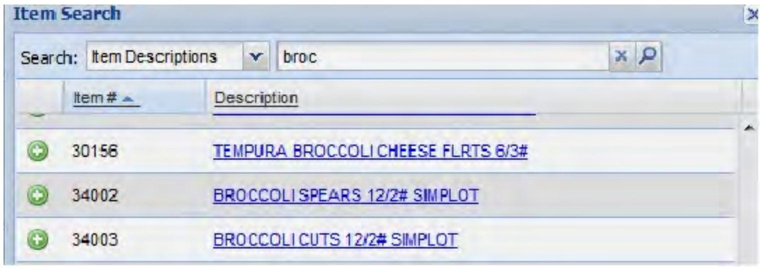
Updating the Featured Item Block

You have the ability to select an item to be your “featured special” in the **Featured Item** block of the website home page. You can add text and a picture of the item to the block. Follow these steps to edit the **Featured Item** block:

1. Click the **Website** tab, and then click the **Content** 

button.
2. Click on the **Featured Item** block in the content list on the left.
3. The featured item dialog will display with the information currently in the block.
4. Click the **Clear** button to clear the page.
5. Click and check the **Show featured item** box to display it on the **Home** page of your website.
6. Click **Select an item to feature.**
7. The **Item Search** dialog box displays. In the **Search** drop down list select a search option: **Item Descriptions**, **Class** and **Item Number**.
8. Enter text in the box and click to search. 
9. The **Item Search** box displays the search results.
10. Find the item and click the Plus icon  to select it.

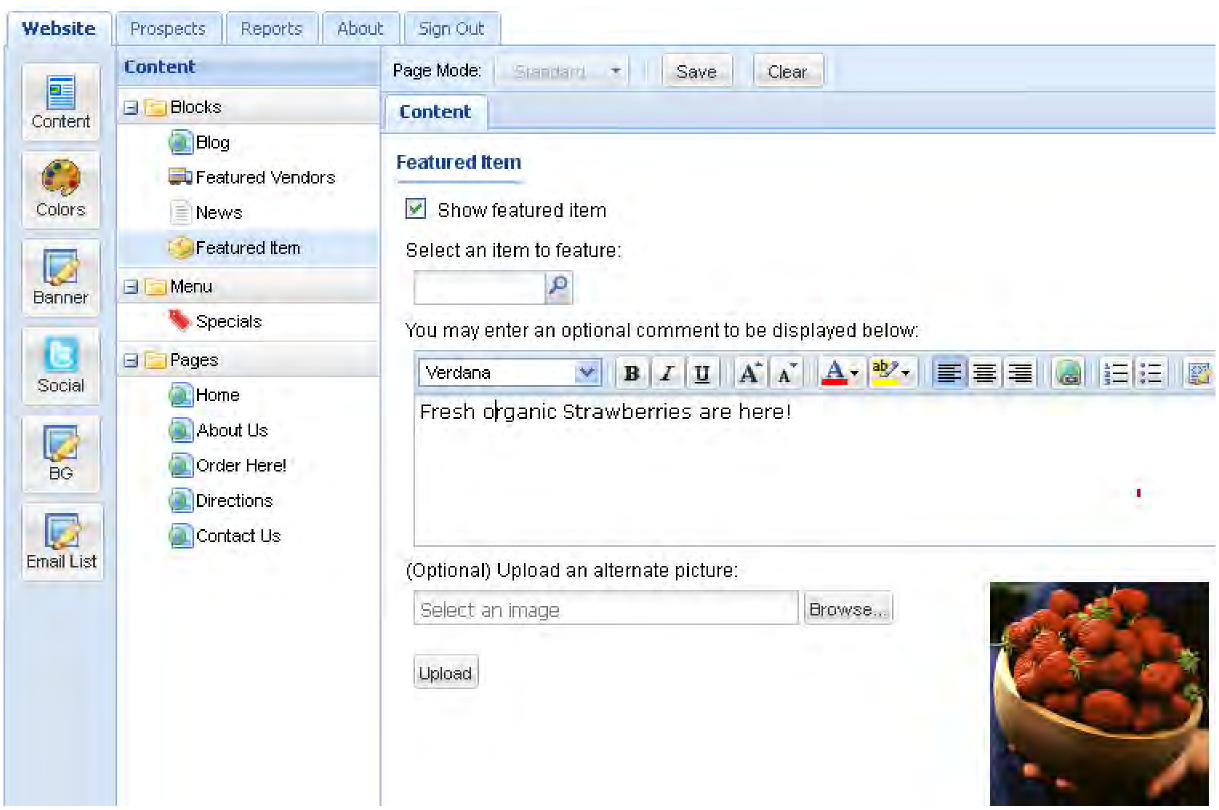
11. Click the blue **Description** link to view the Product information.



12. The **item #** will now display in the **Select an item to feature** box.

13. You now have the option to add a comment in the comment text box.

14. Use the tools discussed previously in this chapter to change the text color, font, highlight text, and change text size of the comment.



15. You have the option to upload an image or alternate image for the item. The supported image formats are JPG, JPEG, GIF and PNG.

16. To upload an image for the item: Click the **Browse**  button.

17. The **Open** dialog box will display.

18. Locate the desired image file on your computer. Click on the image file to select it.

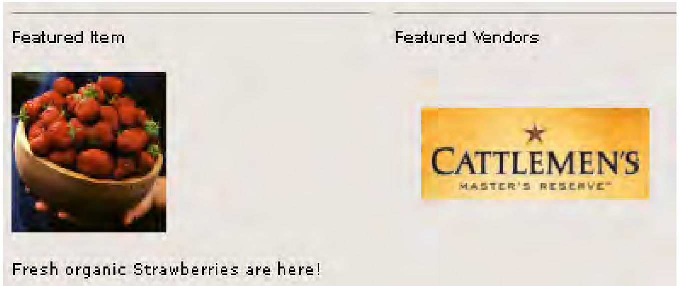
19. Click the **Open**  button.

20. Click the **Upload**  button.

21. The image file will now be uploaded and display in the image area.

22. Click the **Save** button and your website will be updated.

The **Featured Item** and **Featured Vendor** blocks as they are seen on the **Home** page of the website.



22.6 Website Specials Setup

Specials Menu Content

The update process for the **Menu** content **Specials** link is not the same as the process for your other web pages. Currently you must select from two **Link Action** options;

- **Show Price Level 1 Sale Items –** This option will display all the items from your main **entrée** system which have been defined in the "**Sale Pricing**" tab of **Inventory File Maintenance**.

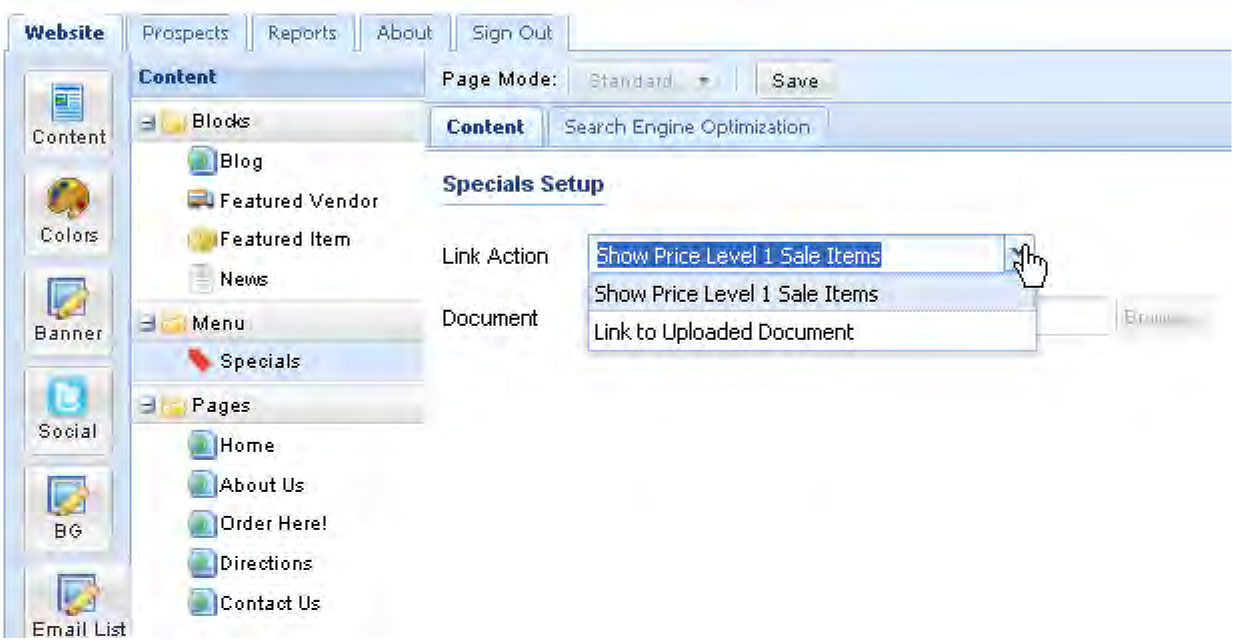
- **Link to Uploaded Document –** This option allows you to select a file from your computer to upload for the **Specials** link content.

The uploaded document will be the **only** information the **Specials** link opens. Some examples of documents you can upload are:

- A sheet listing your sale items with/without images in PDF file format.
- A picture of products with file format JPG, JPEG, GIF, or PNG.
- HTML files.
- Notepad files.

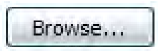
Note To ensure that your customers can view your Specials link document, Word, Publisher and Excel files need to be converted to PDF file format before uploading.

- PDF files will readily open in a new window of the browser when the customer clicks on the **Specials** link. However files from other software packages require the customer to have that software installed on their computer to view your **Specials** document.



Specials Link Setup Process

1. Click the **Website** tab, and then click the  **Content** button.
2. Click on **Specials** in the **Menu** folder of the Content list on the left.
3. The document currently uploaded to the **Specials** link is shown in gray text in the **Document** file name selection box.
4. To add new information to the **Specials** link select a **Link Action** from the drop down list. Your options are **Show Price Level 1 Sale Items** or **Link to Uploaded Document.**
5. If you select **Show Price Level 1 Sale Items** go to step 7 to save.
6. If you select **Link to Uploaded Document**

   a. Click the **Browse**  button.

   b. The **Choose File to Upload** pop up box displays. Select the desired file from your computer. Click **Open**.

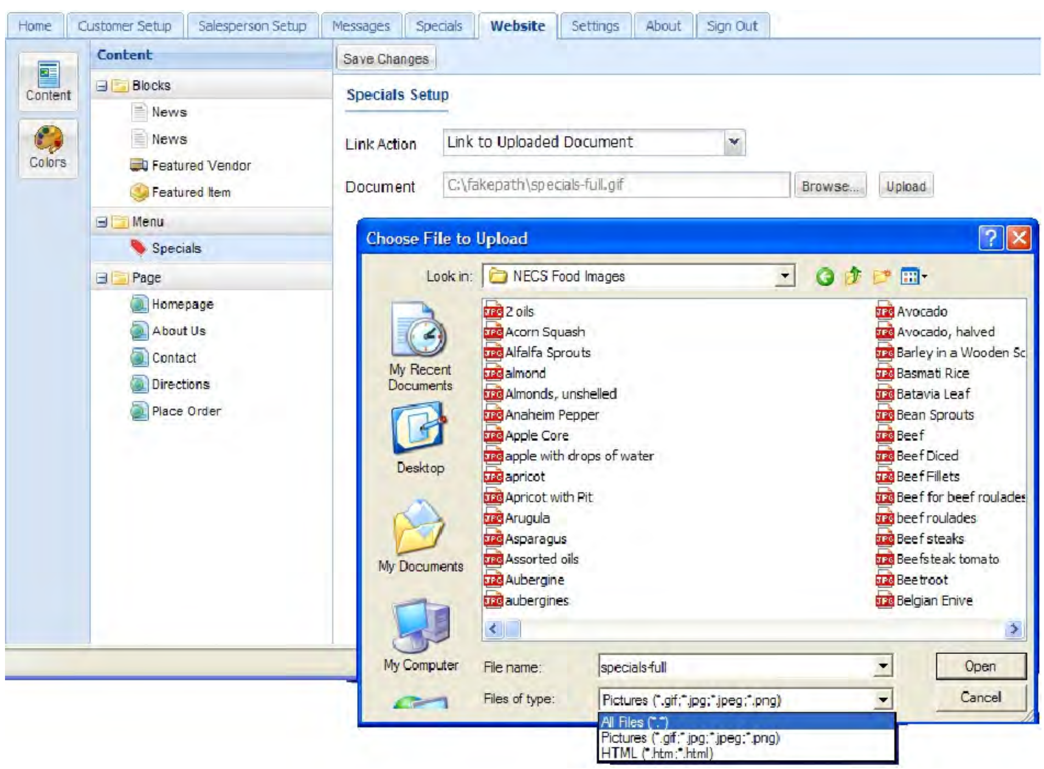
   c. Click the **Upload**  button.

   d. Once the file has uploaded go to step 7 to save.

7. Click the **Save Changes**  button to save your changes and update the **Specials** link content in your website.

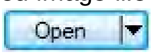
Example

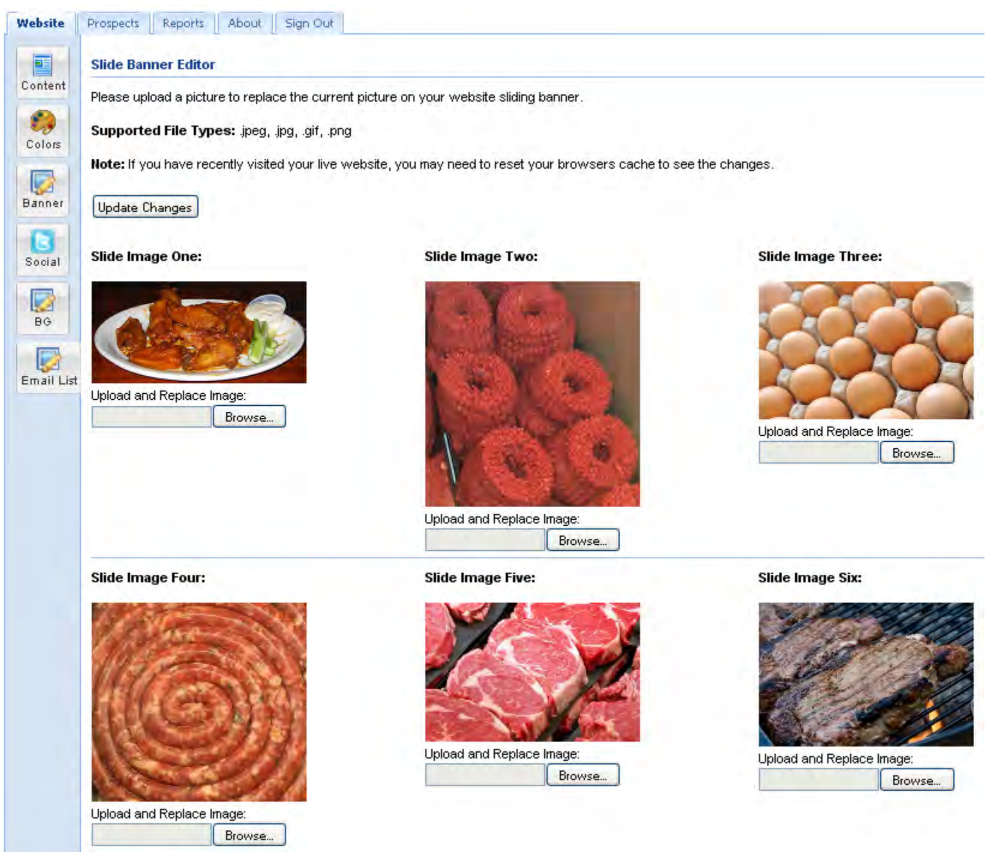
Back: The **Website** tab **Specials Setup** screen **Link to Upload Document** selected.
Front: When you click the **Browse** button the **Choose File to Upload** pop up box displays. Find and select your file and click **Open.**



22.7 Website Banner

The new "Banner" editor allows distributors to upload up to six images of their own to be used in the scrolling image banner on the website. Be sure to clear the cache of your internet browser to see the new banner images in your website instructions follow this section.

1. Click the **Website** tab, and then click the **Banner** button.
2. Select a Slide Image you want to replace with an uploaded image from your computer, the supported image formats are JPG, JPEG, GIF and PNG.
3. Click the **Browse**  button and then the **Open** dialog box will display.
4. Locate the desired image file on your computer, click on the image file to select it.
5. Click the **Open**  button.
6. Click the **Update Changes** button.
7. The image file will now be uploaded and display in the selected slide image area.
8. Repeat the process for all the slides where you want to replace the stock images.



You **must** have **6** images loaded into the banner editor. If you have less than six of your own images and do not want to use stock images, upload your images twice to fill the empty image slots.

Clearing the Browser Cache after a Website Banner Updates

Once you have clicked the **Update Changes** button and replaced any images in your website banner you must clear the cache of your internet browser to see the new banner in your website.

- If your internet browser is Internet Explorer follow these steps:

  a. In the browser menu click **Tools** > **Delete Browsing History**.
  b. The **Delete Browsing History** dialog box will display.
  c. Check the box next to **Temporary Internet Files** in the list and click **Delete**.

- If your internet browser is Mozilla Firefox follow these steps:

  a. In the browser menu click **Tools** > **Options** > then the **Options** dialog box will display.
  b. Click the **Network** tab > go to the **Offline Storage** section > click **Clear Now**.
  c. When the clear operation is complete click **OK**.

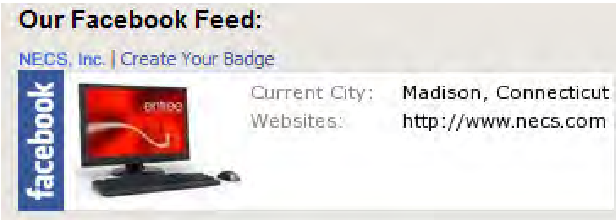
- Now that the temporary files in the cache have been deleted view your website in your browser to see your banner changes.

22.8 Social Networking

A new "Social" feature has been added to allow you to integrate Twitter and Facebook feeds into your **entrée.NET** website home page. The use of social networking is completely optional in your **entrée.NET** website. The choice of which social networking options you add to your website are up to your discretion. Below is an overview of the links and feeds features to get you started with social networking. If you have the time you can explore more advanced social networking options for your company website in both Twitter and Facebook. For more information about your options read the **Social Networking Feeds** section of this chapter.

This feature supports the automatic creation of a "Follow Us" icon and the ability to pull in a feed for your site from these two social networking services. To create a "Follow Us" link enter your Twitter page URL into the "Twitter Link" text box or enter your Facebook page URL into the "Facebook Link" text box.

Optionally you may enter a feed code provided by either service into the "Widget Code" text box to display your tweets and Facebook status updates directly on the website in addition to the "Follow Us" link.



What is a Username?

A username is usually a name that a person chooses to go by when registering for a website or program, as an alternative to their real name. It is a unique word that only one person can use. Usernames are usually assigned passwords for security purposes.

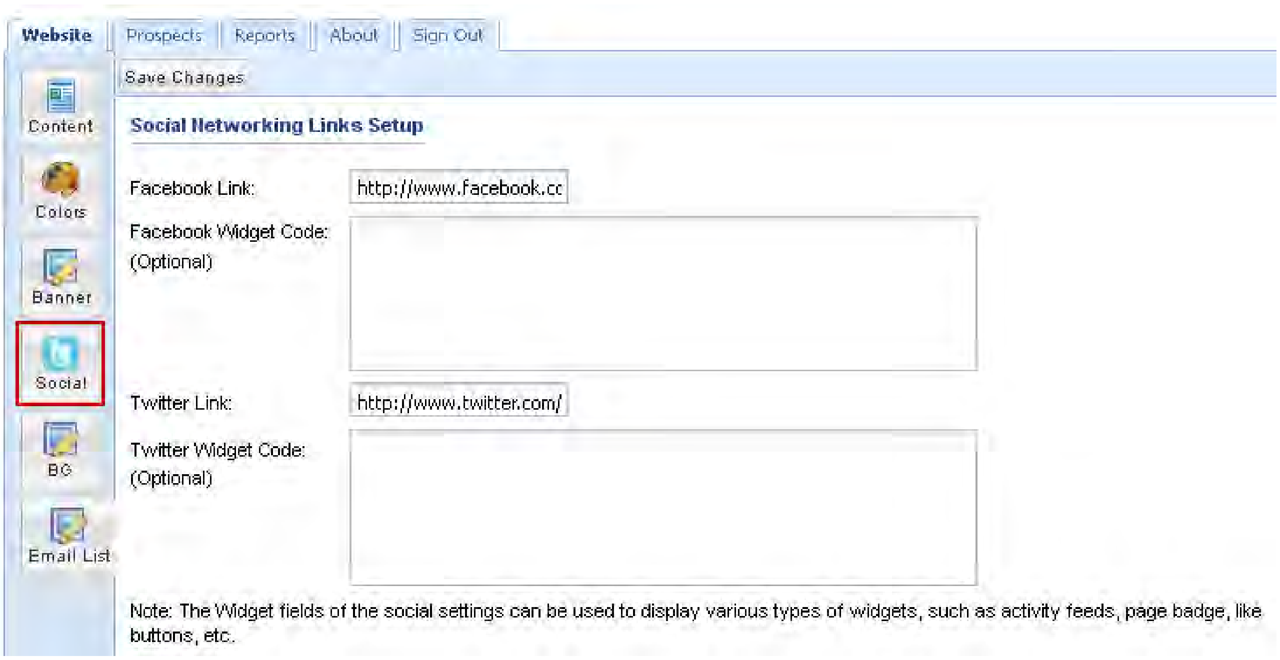
You can customize your Facebook and Twitter accounts by selecting unique usernames for your business when you first create your account. In Facebook your username will appear in the location bar of your browser after "http://www.facebook.com/" in the Profile page. In Twitter your username is the text following the **"@"** at the top of your Facebook Profile page.

To access entrée.NET social networking features

1. Login to **entrée.NET** as the administrator or website manager.

2. Use menu path: **Website** tab > click the **Social** button.

3. The **Social Networking Links Setup** section will be displayed. This is where you will paste the Facebook or Twitter links and/or widget code from your account.



Adding a Facebook Link to your entrée.NET Website

1. Login to your Facebook account.

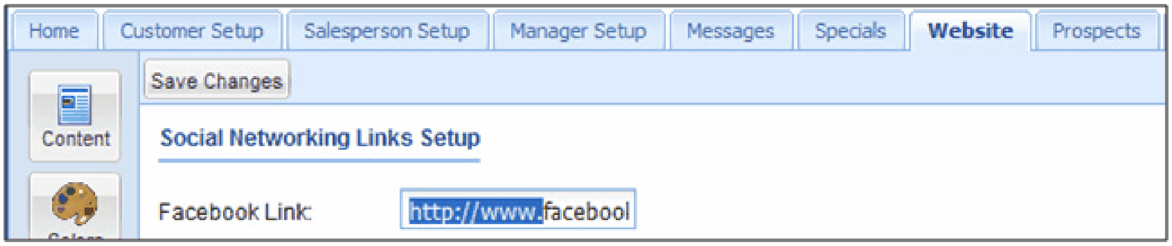
2. Click the **Profile** button in the top toll bar.

3. Go to the **Contact Information** section.

4. Left click and copy the link information in the **Facebook** field. You should see “facebook.com/username” where username is your Facebook account username.

5. Paste this code into the **Facebook Link** text box.

6. Now edit the link information in the text box. Click in the beginning of the text box and add **“http://www.”** in front of the text you just pasted. This will complete the Facebook link address.



7. When complete it should look like this: **http://www.facebook.com/username** where **username** is the username on your Facebook account.

8. Click the **Save Changes** button when done.

Adding a Twitter Link to your entrée.NET Website

1. Login to your Twitter account.

2. Your Twitter Link code is "http://www.twitter.com/username" where "**username"** is the username on your Twitter account.

3. Copy the link above and substitute your Twitter username in the text. Then paste the corrected text in the **Twitter Link** field in the **Social Networking Links Setup** section.

4. Click the **Save Changes** button when done.

22.8.1 Social Networking Feeds

Once you have created an account in Facebook or Twitter you can use their plugins for your **entrée.NET** website home page. You can add as many links as you would like on your website home page in the Social Networking Links Setup section of the **Social** button feature in the Website tab of **entrée.NET**.

Options available for the Facebook Widget Code field in entrée.NET

1. If you already have an RSS feed on your company website copy this code and paste it into the **Facebook Widget Code** text box.

2. **Activity Feed Plugin:** The Activity Feed plugin displays the most interesting recent activity taking place on your site.

   Link to the Activity Feed Plugin: http://developers.facebook.com/docs/reference/plugins/activity/

3. **Like Button:** The Like button lets a user share your content with friends on Facebook. When the user clicks the Like button on your site, a story appears in the user's friends' News Feed with a link back to your website.

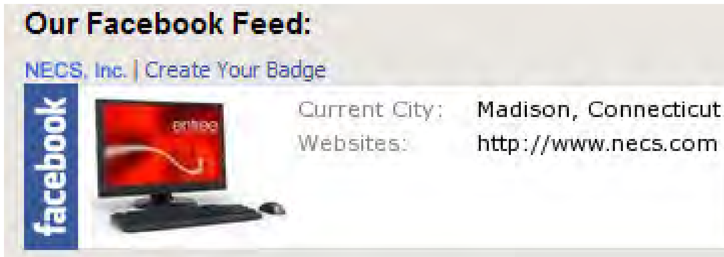
   Link to Like Plugins: http://developers.facebook.com/docs/reference/plugins/like/

4. **Badges**: The "Find Us on Facebook" badge provides your business a way to promote your Page off of our website, and help direct your customers to your presence on Facebook.

   How to access Profile Badges:
   a. Login to your Facebook account.

   b. Click the **Profile** button in the top menu bar.

   c. In the column on the left at the bottom click the **Add a Badge to Your Site** link.



5. **Facepile**: The Facepile plugin displays the Facebook profile pictures of users who have liked your page or have signed up for your site.

   Link to the Facepile Plugin: http://developers.facebook.com/docs/reference/plugins/facepile/

Adding your Facebook Widget Code to entrée.NET

1. Login to your Facebook account.

2. Once you have decided which feed to use in Facebook. Use their plugin to generate the source code for your feed.

3. Copy the source code from Facebook and paste it into the **Facebook Widget Code** text box.

4. Click the **Save Changes** button when done.

Adding your Twitter Widget Code to entrée.NET

1. Login to your Twitter account.

2. To view “FOLLOW US” on Twitter buttons click the **Resources** link at the bottom of the Twitter page.

3. Click the “**See all Follow buttons**” link.

4. At the bottom of the page click the “**Follow me on Twitter**” or the “**Follow us on Twitter**” link to change the button text you want displayed. Click a button to select the one you want to use in your **entrée.NET** website.

5. Click the button and the source code text box will pop up.

6. Here is a sample of the source code:

7. Copy the source code from Twitter and paste it into the **Twitter Widget Code** text box.

8. Click the **Save Changes** button when done.

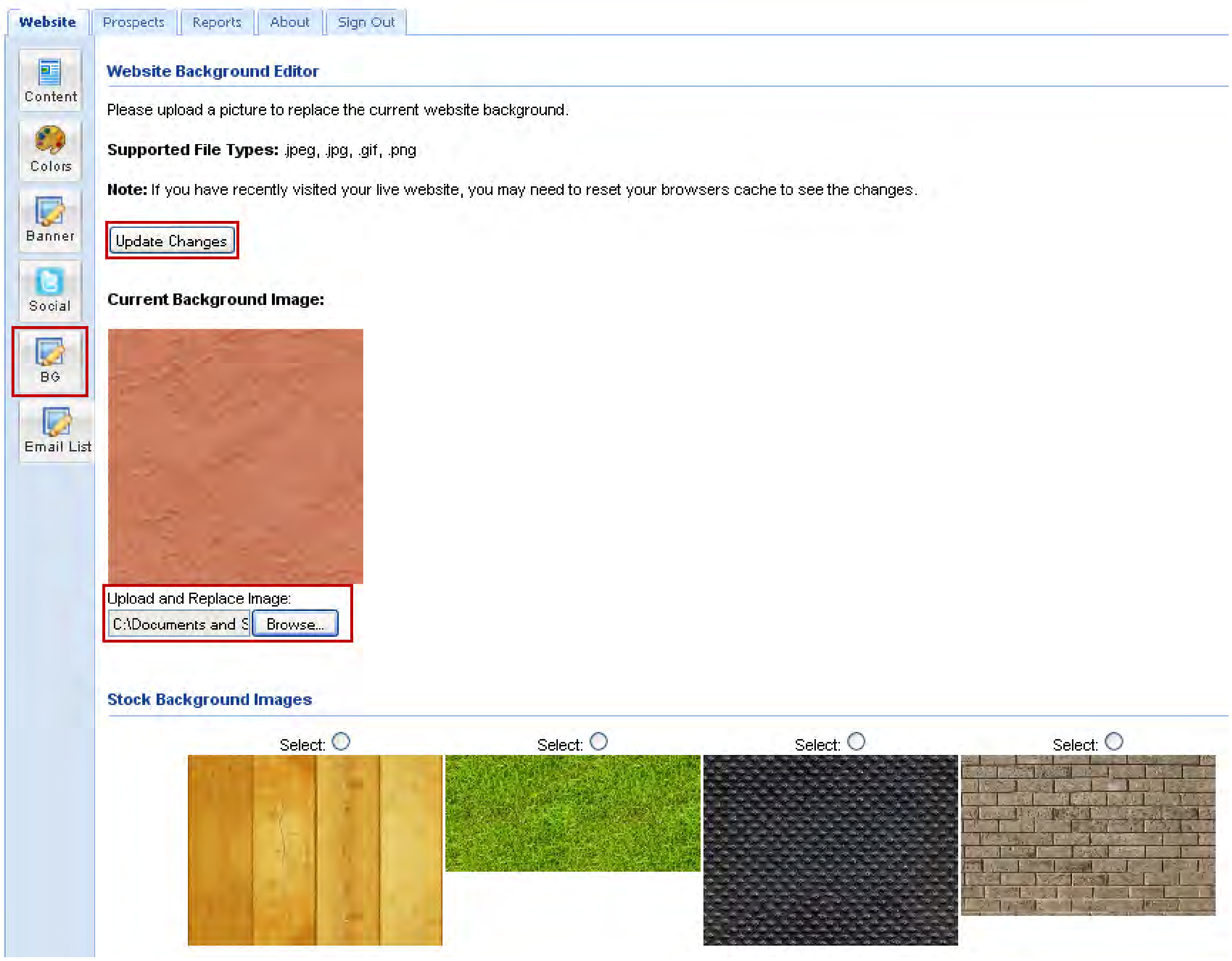
22.9 Website Backgrounds

The new "Website" tab background feature gives you the ability to change your **entrée.NET** website background image. The images files types supported in this feature are jpeg, jpg, gif and png.

Accessing Backgrounds

1. Login to **entrée.NET** as the administrator or website manager.

2. Use menu path: **Website** tab > click the **BG** button.



How to update your website background

1. Click the "**BG**" button and the **Website Background Editor** screen is displayed. You have two options available to you for selecting background images, our stock images or upload your own images.

2. **For stock background images:**

   a. Click the **Select** button for the desired background image.

   b. Click the **Update Changes** button to save your website background.

3. **To upload your own background images:**

   a. Click the **Browse**  button and the **File Upload** dialog box will display.

   b. Locate the desired image file on your computer, click on the image file to select it.

   c. Click the **Open** button.

   d. The image file will now be uploaded and display in the **Current Background Image** area.

   e. Click the **Update Changes** button to save your new website background.

Example An uploaded image in the **BG** screen and with the website home page with a new background.

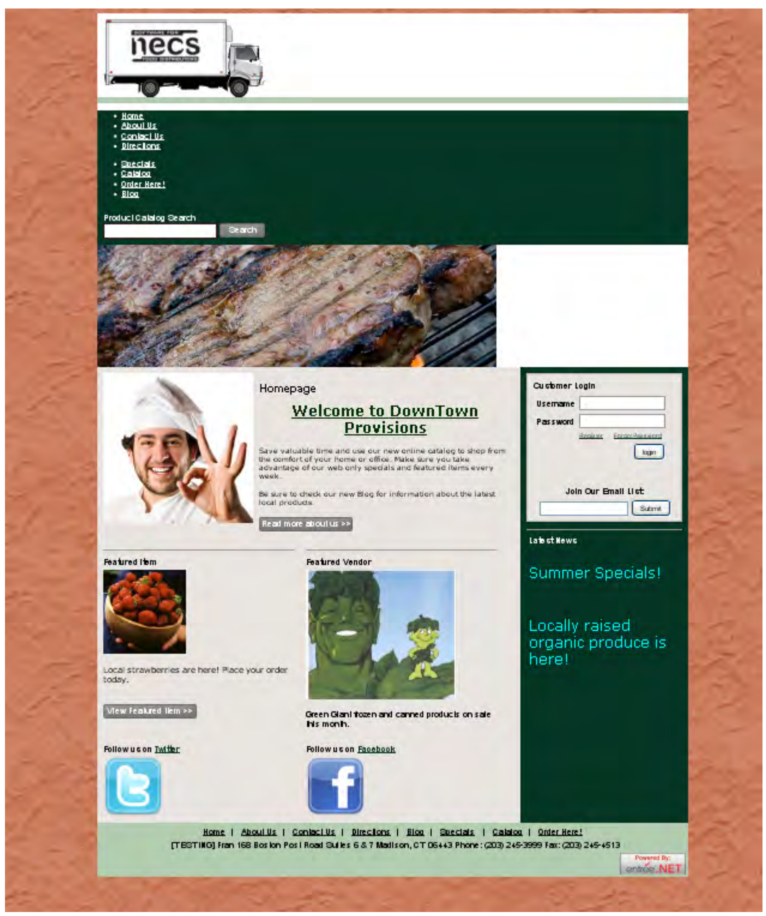
Both the stock and uploaded images will be tiled in the website background.

Note Some images you upload may not work well as website backgrounds.

After you update your website background from images you upload, you should open your web browser to check your website home page.

If it does not look good try another image or use a stock image.

Try to keep the images for your background simple and similar to the stock images provided.



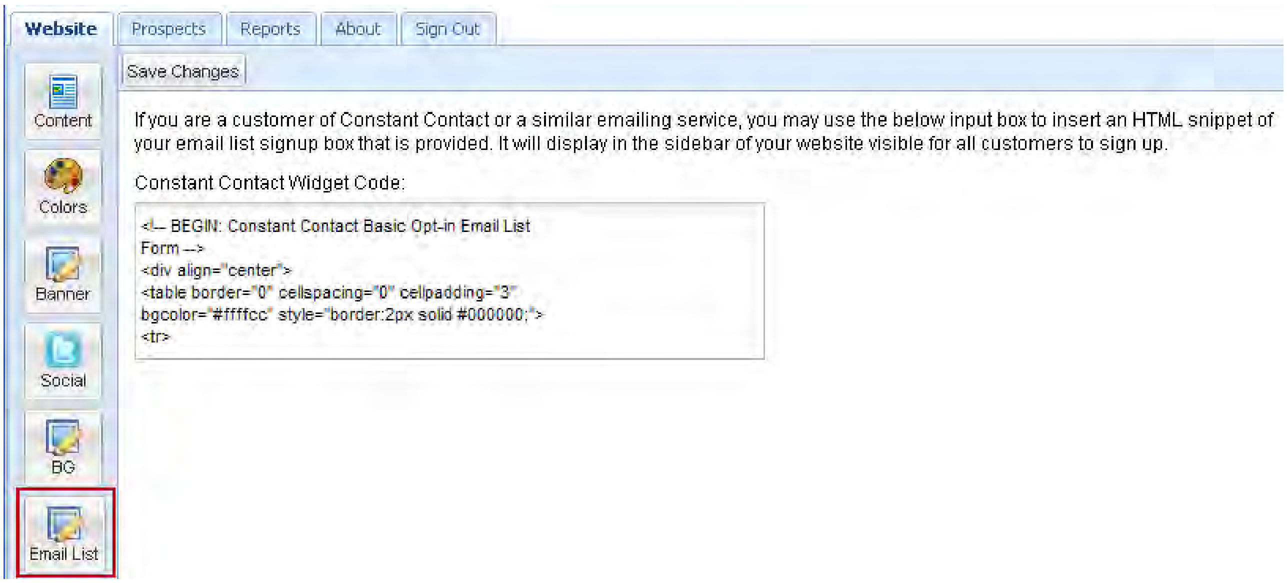
22.10 Website Email List

The "Website" tab Email List feature allows you to add a 3rd party mailing list sign-up widget to the sidebar of your website. Just add the mailing list "widget" code HTML from your 3rd party mailing list provider, such as Constant Contact, to enable the feature.

Accessing the Email List

1. Login to **entrée.NET** as the administrator or website manager.

2. Use menu path: **Website** tab > click the **Email List** button.



3. Sign in to your 3rd party mailing list provider, like Constant Contact. Create and customize a Join My List box. Then copy the "widget" code HTML they provide for your account and save it in a text file on your computer.

4. Paste the "widget" code HTML into the Constant Contact Widget Code box as shown above.

5. Click the **Save Changes** button.

6. The widget from your 3rd party provider will then be displayed in the right hand sidebar of the website Home page.

A sample of HTML code has been included in the image above. Your code will be copied from your account with your mailing list provider and may look different. Please visit **www.constantcomtact.com** for more information about Constant Contact and creating email marketing campaigns.

* Constant Contact is a registered trademark of CONSTANT CONTACT,INC. Corporation.

22.11 Contact List

The Contact List feature is used to populate the contact information to be presented on the **Contact Us** page of your website. Enter the information about the people in your business who will be the customer contact points.

- **Tools**
  - Add New Contact
  - Edit Contact
  - Delete Contact

- **Columns**
  - **Order** - Sets the order contacts are displayed in the list. Blank defaults to last.
  - **Name** - Contact's name.
  - **Title** - Contact's job title.
  - **Phone** - Contact's phone number.
  - **Fax** - Contact's fax number.
  - **Email** - Contact's email address.

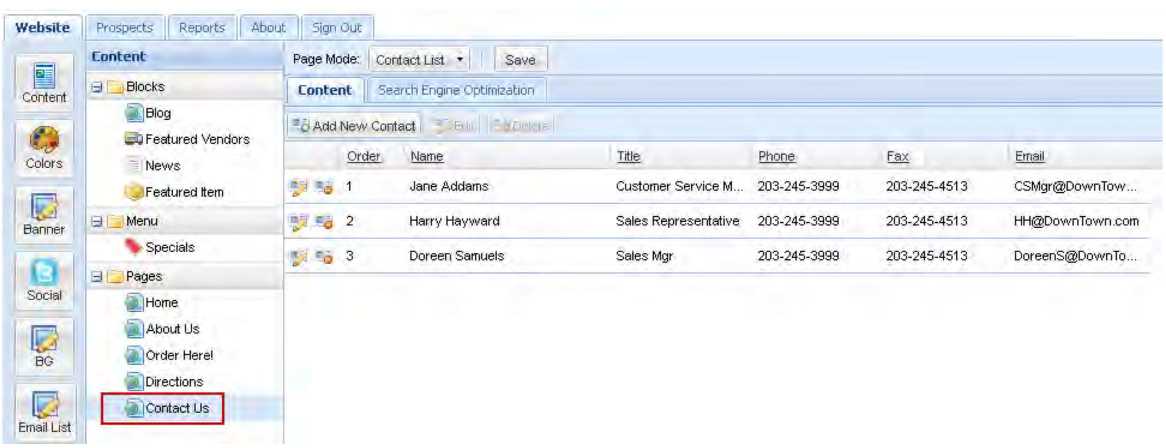
Creating a Contact List

1. Click the **Website** tab, and then click the **Content** button.

2. Click on **Contact Us** in the **Pages** list.

3. In the Page Mode drop down menu select **Contact List**.

4. The **Contact List** page will display with your current contact list information.

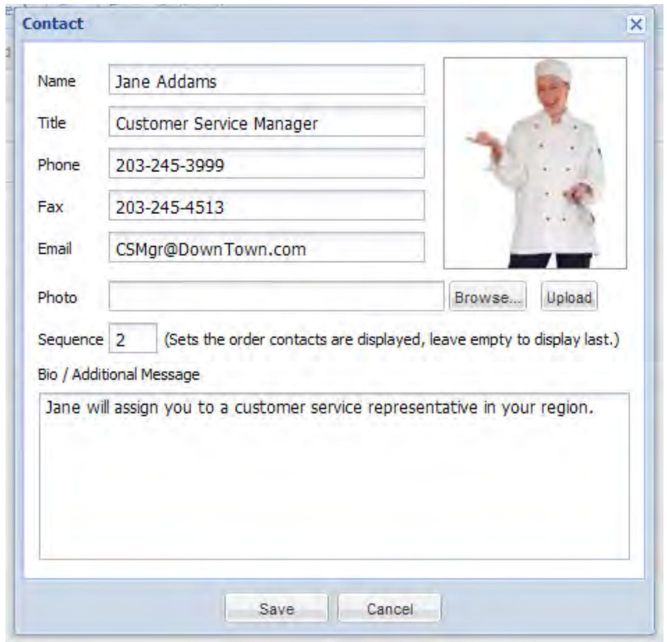


5. To add to your contact list click the **Add New Contact** button.

6. The **Contact** dialog box will display.

7. Enter the following information:

   a. **Name** - contact name.
   b. **Title** - contact title.
   c. **Phone** - contact phone number.
   d. **Fax** - contact fax number.
   e. **Email** - contact email address.
   f. Add a photo to the contact card if you desire. Click **Browse**, select the file then click **Upload**.
   g. **Sequence** - an assigned numerical value representing the order of the contact in the list.
   h. **Bio / Additional Message** - Add any information here to assist with communications with your customers.



8. Once all the information is entered click **Save**.

9. Repeat steps 5 - 8 until all your contacts have been entered into the system.

Example This is how the **Contact Us** page looks in the website with the **Contact List** information from the previous page.

Editing a Contact

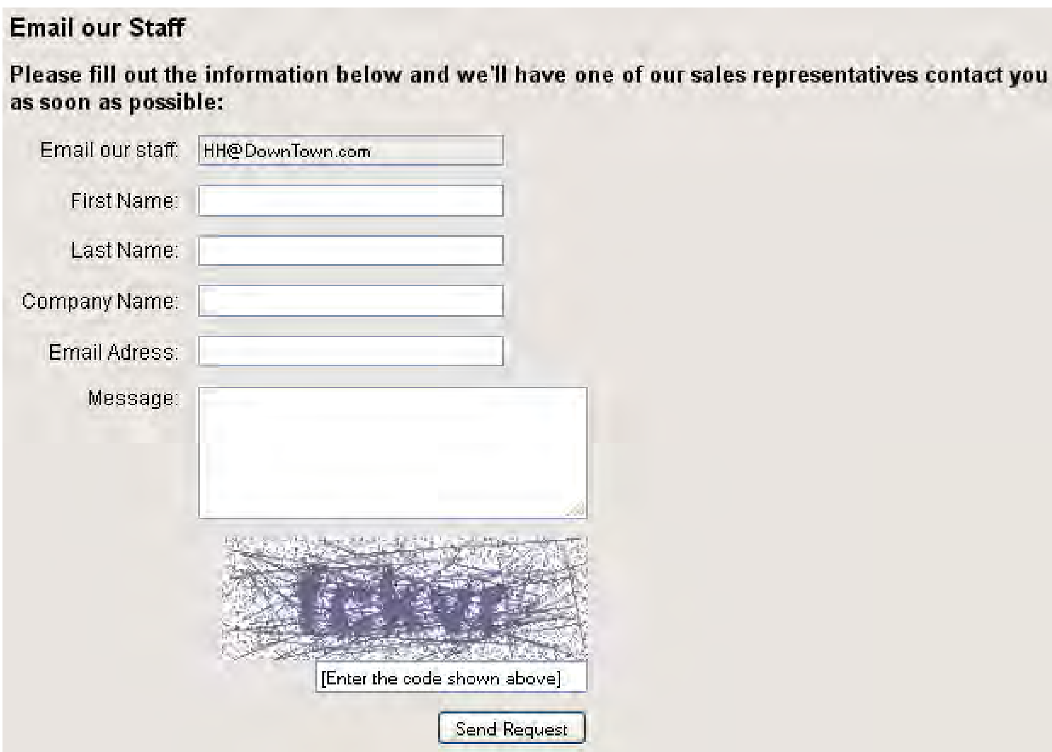
1. When the **Contact List** page is displayed click on the desired contact name in the list.
2. Click on the **Edit** button in the menu bar or click the **Edit** icon in the tools column on the far left.
3. Click **Save** in the **Contact** dialog box when your updates are done.

Deleting a Contact

1. When the **Contact List** page is displayed click on the desired contact name in the list.
2. Click on the **Delete** button in the menu bar or click the **Delete** icon in the tools column on the far left.
3. Click **OK** in the delete confirmation dialog box.

Contact Email Feature

Emailing your company contacts just got easier for your customers and prospects. When visitors to your website **Contact** page click the email address of a company contact an **Email our Staff** form will be displayed. The visitor simply needs to fill out the form, enter the security code displayed and click the **Send Request** button. Now the pre-addressed email message is on its way to your contact.



Note The website has been modified so email addresses are more difficult for spammers to retrieve by crawling your web pages. This will help to eliminate junk email from your company email system.

Chapter 23

FAQ

23 FAQ

Q1. Can I change my customer's order after it has been submitted?

A1. Once you have clicked the **Complete Order** button you cannot change the order without contacting our customer service department directly by phone or email.

If the order has a status of "Open" in the Orders section of the customer's **Account** page, click the **Edit Order** icon to make your changes and then complete your order.

Q2. How will I know if you received my order?

A2. We will send an email notification showing receipt of your customer's order to your email address. This email will contain the details of your order and an order number.

Q3. Do I have to click the "Complete Order" button when I am ready to check out?

A3. Yes, you do have to click the **Complete Order** button to check out. When you click this button it transmits your order to our main computer system for processing.

Q4. What if I don't have time to finish my order in one sitting?
Can I place items in my customer's cart and checkout later?

A4. You do not have to complete and submit your order in one sitting. If you need to continue working on your order at a later time, it is OK to sign out. The items in your shopping cart will automatically be saved for you in an order with a status of "Open" in the **Orders** section of your customer's **Account** page.
When you sign in later go to the **Orders** section of the customer's **Account** page, click the **Edit Order** icon and your shopping cart will be restored then you can complete your order.

Q5. Doesn't it take a long time to place an order?

A5. No, the system was designed to speed you through the ordering process. For example, the **Standard Order** page contains all the items regularly purchased by the customer. Go to **Standard Order** and adjust the quantities, check the **Specials** page for any bargains, select a delivery date, click the **Complete Order** button in the shopping cart and you are done!

Q6. How do I change the information displayed in Standard Order with Order Guides?

A6. By creating and using "Order Guides" you provide targeted lists of products to be viewed in the **Standard Order** page. These Order Guides are displayed in the **Guides** drop down menu. See the Order Guides chapter for more detailed information.

Q7. How do I turn off product images?

A7. To turn off product images or control the columns viewed in your **Standard Order**, **Quick Entry** and **Specials** pages use the **Grid Menu** icon. Just remove the check marks from the box for the columns you do not want to display.

Q8. How do I change the layout of the screens?

A8. Use the Grid Menu icon  to change the layout of the columns displayed on the screen.

Q9. I have some suggestions to improve the way the online ordering works. Who should I contact to let them know my thoughts?

A9. You can send an email to NECS, Inc., the designer of our software. The email address to use is **chris@necs.com**. Please reference us as the distributor when writing, and provide as many details as possible.

Q10. How do I change my password?

A10. To change your password: Click on the **My Account** tab and click on **Account Settings** to view that section. In the **Password** section type your new password in the upper Password box then retype the same password in the **Password (Again)** box. Click the **Update Account** button to save your changes.

Q11. What happens if I forget my password?

A11. You have the ability to use an automated process to reset your own password through our website. Just visit our website **Customer Login** area and click the **"Forgot Password"** link. The Lost Password Reset section is displayed. Enter your **Username** and the verification code. This action will trigger an automated email sent to your account email address. This email will contain a temporary password and the link to our password reset web page. Here you will enter your **Username**, temporary password and your new password. If all your information is correct, your password will be reset in the **entrée.NET** system.

Q12. Will you automatically remember my password?

A12. No, our system cannot remember your password, but we can reset your password. However, there are Internet browsers that will remember your password for you.

Q13. Which browser is best for shopping on your website?

A13. Our online ordering system will run in many different web browsers;
Internet Explorer 7 and 8, Mozilla Firefox, Apple Safari and Google Chrome. *

Chapter 24

License Agreement

24 License Agreement

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