Quick Start Guide



Online Ordering System

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Welcome Valued Customers

The Internet has changed the way we all do business and we've realized the importance of providing you the convenience of entering your own orders 24/7/365, while providing you with a wealth of information about your past purchases from us. After careful research, we've selected the **entrée.NET** online system which ties into the system we use in our office.

This system will speed you through the order entry process while helping you identify items you should be ordering but may have missed, locate items in our product catalog and discover our current "specials" and other items on sale or being featured. You can view extensive information about each item including extended descriptions, images, available pack sizes, etc. Our product catalog can be viewed using "Tags" such as Kosher, Gluten Free, Fat Free, Peanut Free, etc. Customizable reports can be generated based on up to 13 months of purchase history including exporting to Excel or PDF documents. You can also view your accounts receivable status, including open invoices and payments.

We feel confident that you will become comfortable with our online system and encourage you to read through this getting starting document.

If this is the first time using our online system and you do not have a **Username** and **Password**, please contact our office and we will set this up for you.

Signing in the First Time

- 1. Visit our website and click on the "Place Order" link. Our Sign In window will then appear.
- 2. Enter the **Username** and **Password** we assigned you and then click the **Sign In** button.
- 3. The Account Setup Wizard will run. Update your Time Zone by selecting it from the drop down list.
- 4. Then click Continue.
- 5. Enter as many email addresses as you need for your order notifications to be sent. Click **Finish**.
- 6. You will now be on the **My Account** tab and your **Account Settings** are displayed for you to update at this time.
- 7. Update and personalize your password, typing it in a second time as a confirmation.
- 8. Next you can enable the **Date Filtered Standard Order** feature. This option allows you to view a copy of your "Standard Order" showing only items that you have recently purchased. The guide can be set as your default order guide and is available in the **Guide** drop down menu of the **Standard Order** tab.

Options:

- a. **Use "Date Filtered Standard Order" as default** Check the box to set this as your Standard Order guide.
- b. **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.
- 9. In the **Email Notifications** area update and add email addresses for your business. Multiple email addresses can be entered in the list by typing a semi-colon between each email address.
- 10. Once all your information has been entered, click the **Update Account** button to save the new information.
- 11. The Notice message will display the message Account Settings updated. Click OK.
- 12. In the **Orders** section of the **My Account** tab select a **date**. Click the **Create New Order** button to create an order from the **Standard Order** tab.

Creating Your First Order

This section will show you how easy it can be to enter an order. The **Standard Order** method is the quickest way for you to complete the ordering process. The **Standard Order** always remembers which of those products you normally order from us. It's a great tool not just for the making the ordering process fast, but it also reminds you of products that you normally order.

- STEP 1. Login to entrée.NET using your assigned Username and Password.
- STEP 2. Click on the Standard Order tab. All the items you normally order will be displayed.
- **STEP 3.** 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 4. Enter the Qty for each item using the arrows.



- As quantities are entered for items, the shopping cart displays those ordered items.
- STEP 5. Enter (or use the calendar tool) the **Requested**Delivery Date in the shopping cart.
- STEP 6. To enter a comment. Click the Edit Comment button the "Type here to enter comments to be included with the order." will be displayed below. Enter your comment for us.
- **STEP 7.** Click the **Complete** button in the top of the shopping cart. The order is then sent into our main **entrée** software and you will receive an email confirming your ordered items.



Hot Tip! Roll the mouse over a button to see the description. Here you see the description for the Complete button.



Hot Tip! Featured Brands - If you click the green Shop Now link the catalog page will display all the items for that brand in our catalog.



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. You can connect to websites containing nutritional informational about the products you buy.

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 will be displayed.

Main System Features

After you sign in to our system you will see a series of 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.



- The My Account tab contains areas of information about your account. These areas are:
 - The Account Settings area allows you to change/edit your main account information.
 - The Orders area is designed to show you the status of the orders you've entered with our system. You can also create a new order from here using the Create New Order button.
 - The Account Overview area will list your invoice balances with us. You will be able to see a breakdown of any moneys due, discounts we've given to you, payment information, and more.
 - The Messages area is your "inbox" for our correspondence with you. Here we will provide you with important information that you need to be aware of. When you are first sent a message from us, you will see a bright yellow pop-up window appear, with our message. This message window appears immediately after you sign in.
 - Address area shows you the Billing Address and Shipping Address we have listed for your account.
 - Delivery Days area will show you the days of the week that we can schedule your deliveries. When choosing a "Requested Delivery Date" for an order, it should fall on one of these days.



The **My Account** tab may not be available to you.

- 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. 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.
- On the Catalog tab if you 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.
- The Standard Order tab will display all the items you have ordered from us in the past. This includes items you have ordered via this online system, as well as items we entered for you on orders input at our warehouse.
- The Quick Entry tab was created for our customers who want to quickly enter an order and know our item numbers.
- The **Specials** tab allows you to view and order our posted specials.
- The Order Guide tab allows you to define and edit targeted lists of items to make your 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 Reports tab allows you to obtain important information about your purchases from us. You have complete control to customize and save the style of reports you prefer. Note: The **Reports** tab and the Scanned Invoices report may not be available to you. 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.

- The **Help** tab in the main menu will provide you with a link to download the User Guide. Just click on the **User Guide Download** link and follow the instructions.
- Our **Request Quote** feature is an easy way for visitors to our 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. Just visit our website and follow the simple process detailed below to request a quote. An email will be sent to us with all your information and a list of the items where quotes have been requested. A confirmation email will be sent to you with your information. We will be in touch with you shortly with the information you have requested.

Frequently Asked Questions

- Q1. Can I change my order after its submitted?
- A1. Once you have clicked the **Complete Order** button you can not change your order without contacting our customer service department directly by phone or email.

 If your order has a status of "Open" in the Orders section of the **My 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 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 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 My Account page. When you sign in later go to the Orders section of the My 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, your Standard Order page contains all the items you regularly purchase. 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 my 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. What if I receive my order and realize that I ordered the wrong item or I receive an item I didn't order?
- **A7.** Please contact our customer service department by phone or email and we will promptly take care of any problems with your order.
- Q8. How do I turn off product images?
- **A8.** 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.

Q9. How do I change the layout of the screens?

A9. Use the Grid Menu icon work to change the layout of the columns displayed on the screen.

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. *

Hot Tips

Hot Tip! Be sure to maximize your browser window to easily view all the information in our website.

Our website may include these features:

- View our Blog using the link in the main menu where we will post articles and news.
- Featured Item This are will show you our "featured special".
- **Feature Brands** A slide show of multiple brands may be displayed. When you click the brand image or logo it will open the catalog page to display the brand's products.
- Ads Look for advertisements (example here is the Tomato image) at the top or bottom of the page which link to related products in our catalog.
- Read our Latest News and visit our social media using the links for Twitter and Facebook.
- Underlined column headings, such as "<u>Item #</u>" and "<u>Brand</u>", 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.

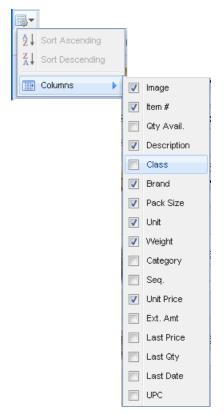
• Check the **Specials** tab to view our weekly sale items. Selecting "**All**" in the "**View Specials By**" drop down menu lists every sale item.



Special Order Items - These items are handled differently because they not regularly carried in our
warehouse. We may require a deposit when you place your order. Additional time is needed for these
items to be delivered to you. These items will have a blue background and carry a yellow Special Order
Item message below.



• Use the **Grid Menu** tools icon to change the layout of the columns displayed.



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 characters 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 Customer 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. You will be sent 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.