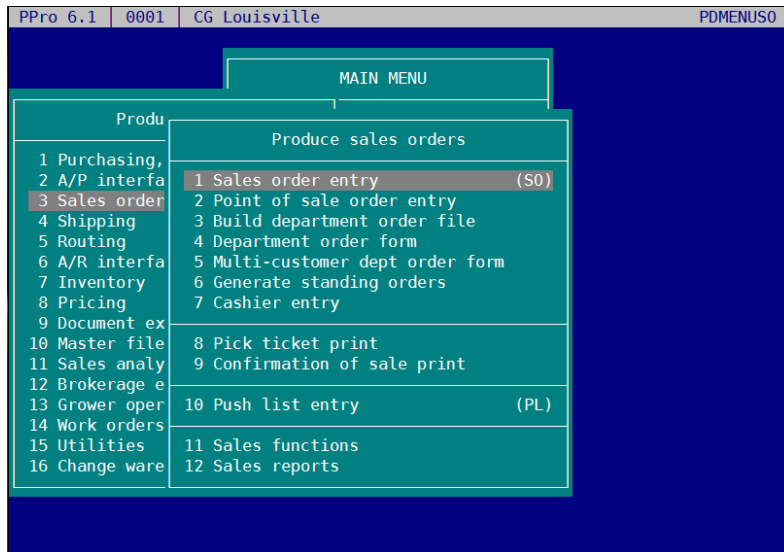


How to place an order using a Profile

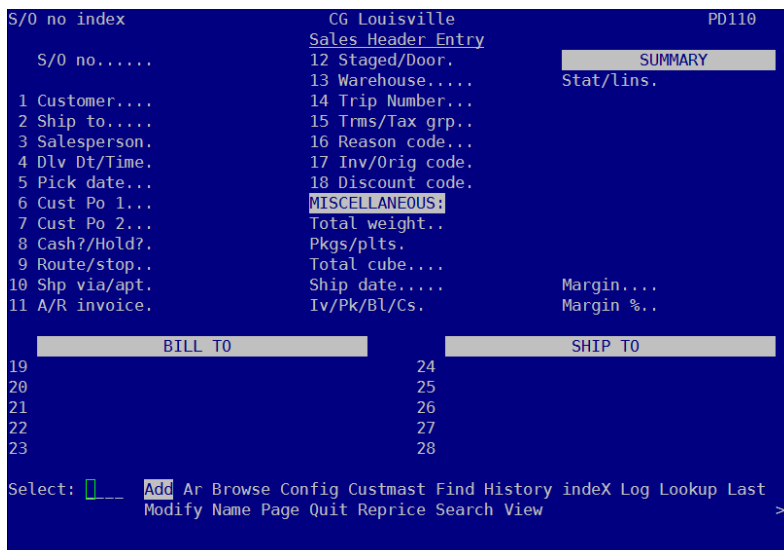
ALWAYS use this method first as this will have the pack size/type of products a customer prefers.

Follow this path to get to the order placement screen:

1 Produce Pro → 3 Sales Orders → 1 Sales Order Entry or use the speed key .11 when on any menu screen



Hit "A" for ADD



Next hit "S" enter to search for the customer. Enter at least 3 characters to find the customer.

S/O no index CG Louisville PD110

S/O no.....

1 Customer....S

2 Ship to.....

3 Salesperson.LMJ

4 Dlv Dt/Time.09/29/17

5 Pick date...

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..

10 Shp via/apt.

11 A/R invoice.

Sales Header Entry

12 Staged/Door.

13 Warehouse.....CG

14 Trip Number...

15 Trms/Tax grp..

16 Reason code...

17 Inv/Orig code.

18 Discount code.

MISCELLANEOUS:

Total weight.. .000

Pkgs/plts. .00 0

Total cube.... .000

Ship date.....

Iv/Pk/Bl/Cs. 0 0 0 0

Stat/lins.0 0

Margin....

Margin %..

BILL TO SHIP TO

19 24

20 25

21 26

22 27

23 28

(S)earch

S/O no index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

Enter search fields

Name..test

At least 3 consecutive non-blank chars

WAREHOUSE: CG ACTIVE ONLY

And select your customer by hitting enter.

S/O no index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1	TEST 1test (1234567890)	1235 JEFFERSON ST.	Louisville	KY
2	3PROTE EVANSVILLE PROTESTANT HOME INC	3701 WASHINGTON AV	EVANSVILLE	IN
3	IPAD IPAD TEST CUSTOMER	1234 JEFFERSON ST.	Louisville	KY
4	TESTEC test ecom (1234567890)	1234 JEFFERSON ST.	Louisville	KY
5	2SPEAD Test Customer Lexington	Hayden's		
6	TEST3 RACHEL TEST 1			
7	TEST4 RACHEL TEST 2			
8	TEST6 DENNY TEST 1			
9	TEST7 JIM B TEST 1			
10	TEST8 JIM B TEST 2			
11	TEST9 Charlie Test			
12	TEST10 Murray's Test Customer			
13	CI-DEM CI DEMATIC TEST CUSTOMER			
14				
15				
16				
17				
18				

WAREHOUSE: CG ACTIVE ONLY

CDS CONTACT:CHEF NAME AND CALL TIME ZIP CODE:40202

PHONE:PRIMARY PHONE FX: STORE ID:

Select: Chg_layout Colors Config Contact Prospect Quit Search Select

Showall View

Today's date is automatically populated. Select the delivery date. You can do this one of four ways.

1. Use the + and – keys to change the date.
2. Enter in the 6 digit date. For example, October 10, 2017 would be 101017. No spaces, dashes or slashes.

```
S/O no.....
3:6305551212 S:PRIMARYPHONE
1 Customer....TEST
2 Ship to.....
3 Salesperson.CDS
4 Dlv Dt/Time.101017
5 Pick date...
6 Cust Po 1...
7 Cust Po 2...
8 Cash?/Hold?.N N
9 Route/stop..TEST1 1
10 Shp via/apt.D
```

3. Hit “C” enter and be taken to a calendar to select the date by using the arrow keys. If you need to advance to the next month, use the “Page Up” key.

September 2017						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

4. You can also hit “S” to search for available delivery days. This is helpful for customers who are restricted to certain delivery days.

Once you have selected the date, press enter. Hit enter again to get through the Pick Date (line 5). **Never change the pick date.**

Along the bottom of the page is the list of commands. PPro defaults to **Order** as the next selection. ***This is the preferred method of entering an order and uses the customer's Profile. Using a customer's profile minimizes errors and is the default method to enter an order.*** Hit enter to select Order.

S/O no index CG Louisville PD110

NOTE Sales Header Entry

S/O no.....04011476 12 Staged/Door. SUMMARY

B:6305551212 S:PRIMARYPHONE 13 Warehouse.....LE Stat/lins.0 0

1 Customer....TEST 14 Trip Number... Invoice... .00

2 Ship to..... 15 Trms/Tax grp.. 0 KE

3 Salesperson.CDS 16 Reason code...

4 Dlv Dt/Time.10/05/17 17 Inv/Orig code.I

5 Pick date...10/04/17 18 Discount code.

6 Cust Po 1... MISCELLANEOUS:

7 Cust Po 2... Total weight... .000

8 Cash?/Hold?.N N Pkgs/plts. .00 0

9 Route/stop..TEST1 0 Total cube.... .000

10 Shp via/apr.D Ship date.... Margin....

11 A/R invoice. Iv/Pk/Bl/Cs. 0 0 0 0 Margin %..

BILL TO **SHIP TO**

19 Test User 24 ttest (1234567890)

20 25

21 1235 JEFFERSON ST. 26 1235 JEFFERSON ST.

22 27

23 Louisville KY 40202 USA 28 Louisville KY 40202 USA

Select: [] Add Airway Allo Ar Bol Browse Charges Confsale Custmast Dept Entry

Find index Invoice Label Lines Log Lookup Last Map Mistakes Modify Name Notes

Order Palletize Pick Quit Reprice Search Ship Stamp Trip View Void Print >

This will take you to the customer's order guide (profile). Here is our TEST customer's profile. From here, you can use the arrow keys to select the items the customer needs. In this example, the customer ordered 1 case of carrots, 1 case of roma tomatoes, 1 case of yellow onions, 2 bags of chopped romaine, 2 each heads of iceberg lettuce, 1 case of 4 oz. beef patties, 1 case of 5 oz. chicken breasts and 1 box of 12" film wrap.

-S/O:04011010-10/10/17-ttest (1234567890)									
CHARGE									
SEQN	DESCRIPTION	QTY	LOT	SL	PRICE	AVAIL	ON	HD	
10	CARROT - BULK 50LB CASE	1.00			28.35	211e	215		
15	CELERY - NUMBER 1 24/30CT CS				26.00	17	17		
20	TOMATO - ROMA 00239 25LB CASE	1.00			33.00	53e	59		
25	ONIONS - YELLOW/JUMBO P 50LB CASE	1.00			21.20	67	71		
30	ONIONS - RED/JUMBO PREM 25LB CASE				18.80	82	84		
35	LETTUCE - ROMAINE 00202 24CT CASE				25.00	85	85		
40	LETTUCE - ROMAINE - CH 6/2LB CASE				20.20	214e	219		
45	ROMAINE - CHOPPED 2LB BAG	2.00			6.40	-3	0		
50	LETTUCE - ICEBERG 00000 24 CT				26.00	48	50		
55	LETTUCE - ICEBERG EA	2.00			1.89	-106	-1		
60	PEPPERS - GREEN BELL XL BUSHEL-CS				22.80	103	108		
65	PEPPERS - RED BELL PREMIUM EA				1.69	-91	-4		
70	BEEF-PATTIES 4-1 80/20 48/4oz CS	1.00			42.924	40	41		
75	BEEF-PATTIES 2-1 CRKSTN 24/8oz CS				44.688	11	11		
80	CHICKEN-BREAST 5oz BNLS 24/5oz CS	1.00			28.2857	58	60		
85	PORK-LOIN C/C BONELESS 6/6# CASE				2.4651	1010	1010		
90	FILM WRAP - 18" X 2000 08602 EACH				21.00	126	126		
95	FILM WRAP - 12" X 2000 08603 EACH	1.00			15.00	30	31		
100	FOIL ALUMINUM 18" X 1000' HD CASE				54.00	18	18		
105	LINER-43X47 56 GAL 1.5m BL 100 CT				34.90	23	23		
CN: LOCN: P D20 06 ACT COST									
PRICE SOURCE:LEVEL PRICE /5+ MARGIN %									
20450-CARBULKLG 10.00 185.34 6.3									
F3=Review <space>=Prod srch +/-=Sequence C=Comments A=Attachments M=More									

Some order guides are quite long. You can filter the order guide by hitting the space bar. In this instance I wanted to find all the patties on the profile, so I typed in "pattie".

S/O:04011010-10/10/17—1test (1234567890)										**CHARGE**	
SEQN	DESCRIPTION				QTY	LOT	SL	PRICE	AVAIL	ON HD	
10	CARROT - BULK				1.00			28.35	211e	215	
15	CELERY - NUMBER 1 24/30CT CS							26.00	17	17	
20	TOMATO - ROMA 00239 25LB CASE				1.00			33.00	53e	59	
25	ONIONS - YELLOW/JUMBO P 50LB CASE				1.00			21.20	67	71	
30	ONIONS - RED/JUMBO PREM 25LB CASE							18.80	82	84	
35	LETTUCE - ROMAINE 00202 24CT CASE							25.00	85	85	
40	LETTUCE - ROMAINE - CH 6/2LB CASE							20.20	214e	219	
45	ROMAINE - CHOPPED 2LB BAG				2.00			6.40	-3	0	
50	LETTUCE - ICEBERG 00000 24 CT							26.00	48	50	
55	LETTUCE - ICEBERG EA				2.00			1.89	-106	-1	
60	PEPPERS - GREEN BELL XL BUSHEL-CS							22.80	103	108	
65	PEPPERS - RED BELL PREMIUM EA							1.69	-91	-4	
70	BEEF-PATTIES 4-1 80/20 48/4oz CS				1.00			42.924	40	41	
75	BEEF-PATTIES 2-1 CRKSTN 24/8oz CS							44.688	11	11	
80	CHICKEN-BREAST 5oz BNLS 24/5oz CS				1.00			28.2857	58	60	
85	PORK-LOIN C/C BONELESS 6/6# CASE							2.4651	1010	1010	
90	FILM WRAP - 18" X 2000 08602 EACH							21.00	126	126	
95	FILM WRAP - 12" X 2000 08603 EACH				1.00			15.00	30	31	
100	FOIL ALUMINUM 18" X 1000' HD CASE							54.00	18	18	
								34.90	23	23	
FILTER STRING..pattie]											
PRICE SOURCE:LEVEL PRICE /5+								ACT COST			
20450-CARBULKLG								MARGIN %			
					10.00				185.34	6.3	

Which brings you to this screen.

S/O:04011010-10/10/17-1test (1234567890)										**CHARGE**	
SEQN	DESCRIPTION				QTY	LOT	SL	PRICE	AVAIL	ON	HD
70	BEEF-PATTIES 4-1 80/20 48/4oz CS				1.00			42.924	40	41	
75	BEEF-PATTIES 2-1 CRKSTN 24/8oz CS							44.688	11	11	

Enter the quantity needed, then escape.

The 2 columns on the right tell you how much of a product is available (AVAIL) and how much is on hand (ON HD). In this instance, we have 211 cases of carrots available and 215 on hand meaning 4 cases are committed to customers already. On occasion, you will see some negative numbers in the Available and/or On Hand columns. In this example we see negatives in the eaches of chopped romaine, iceberg each and red bell pepper each. In most instances, PPro repacks these items from cases to eaches, however, it's a good practice to check the master case to be sure we have stock. If a case is showing 0 on hand or negative inventory, it's likely that item is out of stock.

You can hit “D” to see the last date any item was ordered. This is helpful if a customer has 2 like items and you are trying to determine which they usually get.

S/O:04011010-10/10/17—Itest (1234567890)

CHARGE

SEQN	DESCRIPTION	QTY	LOT	SL	PRICE	AVAIL	ON	HD
10	CARROT - BULK	50LB CASE	1.00		28.35	211e	215	
15	CELERY - NUMBER 1	24/30CT CS			26.00	17	17	
20	TOMATO - ROMA 00239	25LB CASE	1.00		33.00	53e	55	
25	ONIONS - YELLOW/JUMBO P	50LB CASE	1.00		21.20	67	71	
30	ONIONS - RED/JUMBO PREM	25LB CASE			18.80	82	84	
35	LETTUCE - ROMAINE 00202	24CT CASE			25.00	85	85	
40	LETTUCE - ROMAINE - CH	6/2LB CASE			20.20	214e	219	
45	ROMAINE - CHOPPED	2LB BAG	2.00		6.40	-3	0	
50	LETTUCE - ICEBERG 00000	24 CT			26.00	48	50	
55	LETTUCE - ICEBERG	EA	2.00		1.89	-106	-1	
60	PEPPERS - GREEN BELL XL	BUSHEL-CS			22.80	103	108	
65	PEPPERS - RED BELL PREMIUM	EA			1.69	-91	-4	
70	BEEF-PATTIES 4-1 80/20	48/4oz CS	1.00		42.924	40	41	
75	BEEF-PATTIES 2-1 CRKSTN	24/8oz CS			44.688	11	11	
80	CHICKEN-BREAST 5oz BNLS	24/5oz CS	1.00		28.2857	58	60	
85	PORK-LOIN C/C BONELESS	6/6# CASE			2.4651	1010	1010	
90	FILM WRAP - 18" X 2000	08602 EACH			21.00	126	126	
95	FILM WRAP - 12" X 2000	08603 EACH	1.00		15.00	30	31	
100	FOIL ALUMINUM 18" X 1000'	HD CASE			54.00	18	18	
105	LINER-43X47 56 GAL	1.5m BL 100 CT			34.90	23	23	

CN: LOCN: P D20 06

PRICE SOURCE:LEVEL PRICE /5+

20450-CARBULKGL

ACT COST

MARGIN %

185.34 6.3

F3=Review

<space>=Prod srch

+/-=Sequence

C=Comments

A=Attachments

M=More

F10 is a very useful tool.

F10 will take you to the inventory screen when you are anywhere in Ppro and is very helpful for finding out if we have stock on an item and when the item is expected to be back in stock if we are out.

In this example, a customer is inquiring when we will get fine ground black pepper back in stock. Hit F10 and then "S" enter and search for "pepper".

CG Louisville PMSRCH
Inventory by Product Inquiry

1 Product code match.....S

Product Search

PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Enter search fields

Long description..pepper

Packaging.....

At least 3 consecutive non-blank chars

After hitting page down a couple of times, I found the fine/shaker ground black pepper and see that we have 0 on hand and 0 available, but 30 expected.

CG Louisville PMSRCH
Inventory by Product Inquiry

1 Product code match.....S

Product Search

PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1 97101	SPICE - LEMON PEPPER BLEN 27OZ JAR	15	0	15	0
2 97103	SPICE - PEPPERCORN BLACK 16 OZ	24	1	23	0
3 97104	SPICE - PEPPERCORN BLAC LG 4LB TUB	55	0	55	100
4 97105	SPICE - PEPPERCORN PINK 11.2OZ JAR	15	0	15	0
5 97106	SPICE - PEPPER RED CRUSHED 10 OZ	20	0	20	0
6 97107	SPICE - PEPPER RED CRUSHED LG 4 LB	45	0	45	0
7 97108	SPICE - PEPPERCORN SZEC 11.2OZ JAR	16	0	16	0
8 97109	SPICE - PEPPERCORN TELLI 16 OZ JAR	4	0	4	0
9 90539	PEPPERS - PIMENTOS CANNED 14OZ CAN	33	0	33	0
10 97409	PEPPERS - PEPPADEW 6.6 LB CAN	10	0	10	0
11 97139	SPICE - PEPPER FINE/SHAK LB 3.5 LB	0	0	0	30
12 90543	PEPPERS-BANANA SLICED 4 CT CASE	5.5	1	4.5	12
13 90544	PEPPERS - BANANA SLICED EACH 1 GAL	15	2	13	0
14 90549	PEPPERS - GREEN CHILI DI 27 OZ CAN	14	1	13	0
15 20806	PEPPERS - GREEN CHOPPER BUSHEL-CS	83	4	79	28
97101	SPIPEPLEM WOODLAND FOODS				

PRICE : 12.1429 - COMP FILE FORMULA Market : 3.7333

Select: Chg layout Colors Config Days Exceptions Info Lead Lot Quit Search

Select Show Specord View

Arrow down to that item and hit enter to select it.

You will see the available inventory in all warehouses.

Product Inventory by Warehouse						PML
DESCRIPTION	WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001						
1 SPICE - PEPPER FINE/SHAKER GRD LB 3.5 LB BR		0	0	0	0	
2	CG	0	0	0	30	
3	CH	0	0	0	0	
4	CI	0	0	0	0	
5	IN	0	0	0	0	
6	LE	0	0	0	0	
7	NA	0	0	0	0	
8	SP	0	0	0	0	
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
WHSE/PROD#/PROD:CG/97139/SPIPEP30G5LB/BK0 0 0 0 30						
PRICE : 39.2857 - COMP FILE FORMULA Market : 24.400						
Select: Allcomp Altunit Attachments Brand Buyer Chg layout Colors Cond						
Config Customer Days Department Distribute Find Indx Location Movement Product						
Project Quit Select Show Transact Commodity Pallets Warehouse Lead Specord >						

Arrow down to the warehouse that shows a value in the Expect column, then press Enter.

Product Inventory by Warehouse										IMINO
DESCRIPTION					WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001										
1	SPICE - PEPPER FINE/SHAKER GRD LB 3.5 LB BR						0	0	0	0
Lot Inquiry by Product 97139-SPICE - PEPPER FINE/SHAKER GRD LB 3.5 LB										
	LOT NO	DATE	LOCN	CN	DUE/IN	COMMIT	OUT	ON HAND	AVAIL	COST
1	17458452	12/07/18	WB3315		*30*		0	0	0	30
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
VENDOR:WOODLAND FOODS										
PHONE:866-625-8600					FAX:	REF:	SELL: .00			
BRAND:WOODLAND FOODS					AREA:DRYMAT	ON HAND: .00				
Select: [] Account Altunit Average Colors Condition Cstchg Eta Find Freeze										
Label Last Locn Log Modify Pallets Print QC Quit Search Select Showall Showcost										

Here you will see that we expect to receive 30 of this item on 12/07/18 meaning it would be available to the customer on 12/08/17.

To find the location of the product:

- Arrow down to the warehouse
- Hit "L" for Location

Product Inventory by Warehouse						PML
DESCRIPTION	WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001						
1 SPICE - PEPPER FINE/SHAKER GRD LB 3.5 LB BR	BR	0	0	0	0	
2	BT	0	0	0	0	
3	CG	19	0	19	0	
4	CH	0	0	0	0	
5	CI	0	0	0	0	
6	CS	0	0	0	0	
7	IN	0	0	0	0	
8	LE	0	0	0	0	
9	NA	0	0	0	0	
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
WHSE/PROD#/PROD:CG/97139/SPIPEP30G5LB		19	0	19	0	
PRICE : 39.2857 - COMP FILE FORMULA		Market		: 24.400		
		FUTURE		: 24.400		
Select: [] Allcomp Altunit Attachments Days Department Distribute Find index						
Location Movement Pallets Product Project Quit Select Show Transact Warehouse						

- Hit Enter to be brought to this screen

Product Inventory by Warehouse						PD341
DESCRIPTION	WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001						
1 SPICE - PEPPER FINE/SHAKER GRD LB 3.5 LB BR		0	0	0	0	
2	BT	0	0	0	0	

Warehouse.....CG CG Louisville

97139 - SPIPEP30G5LB

1 Default pick location.....W B33 15 W B33 15
2 Default pick location after depletion?...N
3 Miscellaneous secondary location.....
4 Miscellaneous sort value..... 0
5 Default vendor / Ship from vendor.....
6 Default buyer.....
7 Default origin.....
8 Special order item code.....
9 Purchasing lead time code.....
10 Default repack cost code.....
11 Override inventory warehouse.....

Select: [] Add Adnl_locn Config Delete Find Labels Modify Page Quit Showall
Stamp View

The Default pick location is where the item is located. Pick locations that start with W are in the dry warehouse and are shelf stable. Pick locations that start with F are in the freezer. All other pick locations are refrigerated.

How to enter items using Entry mode

You can also enter items via “Entry” mode. By default, always look for items on a profile first. There will be times when a customer requests an item not on their profile. If that is the case, you may search for the item in Entry mode. On the Sales Header Entry page, select “Entry” by hitting “E” or using your arrows to highlight and then press enter. You can go between “Order” and “Entry” modes while on the same order.

S/O no index CG Louisville PD110

NOTE

S/O no.....04011476

B:6305551212 S:PRIMARYPHONE

1 Customer....TEST

2 Ship to.....

3 Salesperson.CDS

4 Dlv Dt/Time.10/05/17

5 Pick date...10/04/17

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop...TEST1 0

10 Shp via/apt.D

11 A/R invoice.

Sales Header Entry

12 Staged/Door.

13 Warehouse....LE

14 Trip Number...

15 Trms/Tax grp.. 0 KE

16 Reason code...

17 Inv/Orig code.I

18 Discount code.

MISCELLANEOUS:

Total weight.. .000

Pkgs/plts. .00 0

Total cube.... .000

Ship date.....

Iv/Pk/Bl/Cs. 0 0 0

Margin....

Margin %..

SUMMARY

Stat/lins.0 0

Invoice... .00

BILL TO SHIP TO

19 Test User 24 ltest (1234567890)

20

21 1235 JEFFERSON ST.

22

23 Louisville KY 40202 USA 28 Louisville KY 40202 USA

Select: [] Add Airway Allo Ar Bol Browse Charges Confsale Custmast Dept Entry

Find indeX Invoice Label Lines Log Lookup Last Map Mistakes Modify Name Notes

Order Palletize Pick Quit Reprice Search Ship Stamp Trip View Void Print >

This brings you to a blank order screen or, if you have entered items in “Order” mode, those items will show up as well.

S/O no index CG Louisville PD114

NOTE

S/O no.....04011476

B:6305551212 S:PRIMARYPHONE

1 Customer....TEST

2 Ship to.....

3 Salesperson.CDS

4 Dlv Dt/Time.10/05/17

Sales Header Entry

12 Staged/Door.

13 Warehouse....LE

14 Trip Number...

15 Trms/Tax grp.. 0 KE

16 Reason code...

17 Inv/Orig code.I

SUMMARY

Stat/lins.0 0

Invoice... .00

S/O Detail Entry

PRODUCT	DESCRIPTION	UN	QTY	LOT NO	SL	PRICE	TOTAL
			0			.00	.00

'S' to search, '@' to view ads

F11=Other

Next, search for the item(s) you would like to add to the order by pressing “S” enter and entering in at least 3 characters to find the item(s). Let’s look for film wrap.

S/O no index CG Louisville PMSRCH
NOTE Sales Header Entry
S/O no.....04011476 12 Staged/Door. SUMMARY
B:6305551212 S:PRIMARYPHONE 13 Warehouse.....LE Stat/lins.0 0
1 Customer....TEST 14 Trip Number... Invoice... .00

Product Search

PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Enter search fields

Long description..film
Packaging.....

At least 3 consecutive non-blank chars

Here are the 3 types of film wrap we carry

S/O no index CG Louisville PMSRCH
NOTE Sales Header Entry
S/O no.....04011476 12 Staged/Door. SUMMARY
B:6305551212 S:PRIMARYPHONE 13 Warehouse.....LE Stat/lins.0 0
1 Customer....TEST 14 Trip Number... Invoice... .00

Product Search

PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1	98012 FILM WRAP - 18" X 2000 08602 EACH	0	0	0	0
2	99187 FILM WRAP - 12" X 2000 08603 EACH	0	0	0	0
3	99539 FILM WRAP - 24" X 2000 06818 EACH	0	0	0	0
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

98012 DISFILMWRAP

1test (1234567890) PRICE : 21.0000 - LEVEL PRMarket : 15.940

Select: Chg layout Colors Config Days Exceptions Info Lot Quit Search
Select Show View

We'll select the 18" by pressing enter and then enter the quantity needed; in this instance 1 box. Be sure to press enter until you get to a new line or the item you entered will not be saved.

S/O no index
CG Louisville
PD114

NOTE
S/O no.....04011476
B:6305551212 S:PRIMARYPHONE
1 Customer....TEST
2 Ship to.....
3 Salesperson.CDS
4 Dlv Dt/Time.10/05/17

Sales Header Entry
12 Staged/Door.
13 Warehouse.....LE
14 Trip Number...
15 Trms/Tax grp.. 0 KE
16 Reason code...
17 Inv/Orig code.I

SUMMARY
Stat/lins.0
Invoice... .00

S/O Detail Entry

PRODUCT	DESCRIPTION	UN	QTY	LOT NO	SL	PRICE	TOTAL
DISFILMWRAP	FILM WRAP - 18" X 2 EACH		1	~*****	CG	21.00	21.00

'S' to search, '@' to view ads
F11=Other

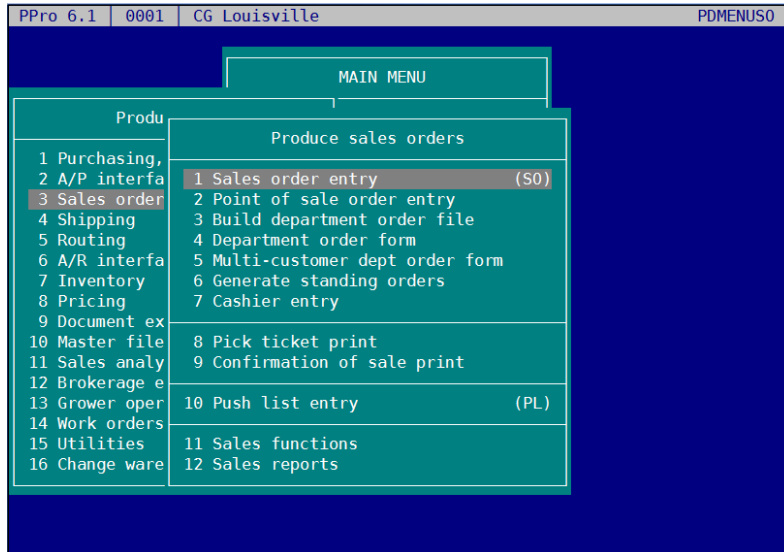
Now hit escape until you get out of the Sales Header Entry page. The order is now in the system and will be processed.

What if the customer has now decided to order 2 boxes of film wrap? To get back to a previous line, hit Escape. Now you can modify the quantity and use the arrow keys to move to another item, if needed.

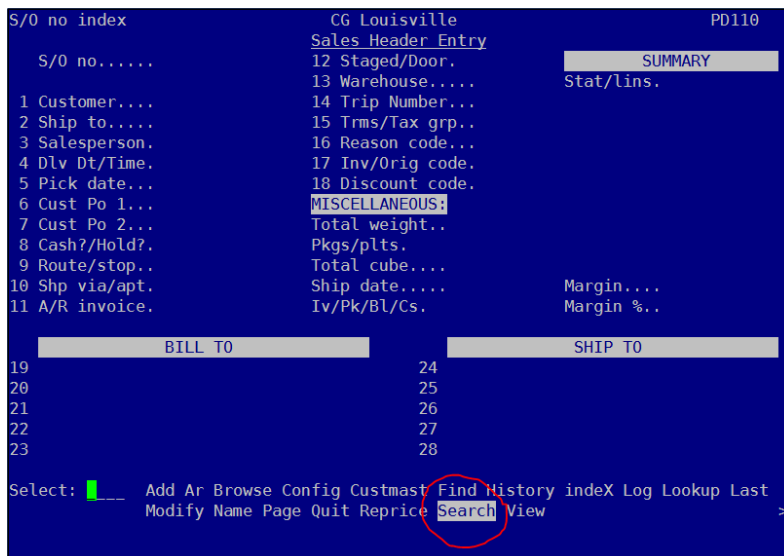
How to Search for an order

Go to the Sales Order Entry screen.

3 – Sales Orders → 1 – Sales order entry



Upon entering that screen, then hit "S" to highlight Search on the bottom menu.



Hit Enter to bring you to this screen. Then hit "s" enter to search for the customer.

Cfg=STD Modified CG Louisville SOS_OPT
 Sales Header Entry
 12 Staged/Door. SUMMARY

S/O no.....

Sales Order Search Options

1	Customer.....S
2	Customer category.....
3	Order status.....
4	
5	4 Salesperson.....
6	5 Include crew of salesperson.....N
7	6 Override crew.....
8	
9	7 Warehouses.....
10	8 Include/exclude warehouses.....I
11	
12	9 Ship via code.....
13	10 Origination code.....
14	11 Ship-to customer.....
15	12 Customer credit codes.....
16	13 Inc./excl. credits codes.....I
17	14 Date range.....06/13/18
18	15 Date type?.....S

(S)earch

Type in at least 3 characters to search. For this example, I am searching for the Test customer.

Cfg=STD Modified CG Louisville CMSRCH
 Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

Enter search fields

Name..test

At least 3 consecutive non-blank chars

ACTIVE ONLY

Arrow down to the customer.

Cfg=STD Modified CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1	TEST	TEST CUSTOMER AND USER	1235 JEFFERSON ST.	LOUISVILLE KY
2	3PROTE	EVANSVILLE PROTESTANT HOME INC	3701 WASHINGTON AV	EVANSVILLE IN
3	000007	PPRO TESTING CUSTOMER	testing address	testing city IL
4	IPAD	IPAD TEST CUSTOMER	1234 JEFFERSON ST.	LOUISVILLE KY
5	4LOG16	LOGANS TEST KITCHEN	2981 SIDCO DR	NASHVILLE TN
6	TESTEC	TESTING ECOM ACCT	1234 JEFFERSON ST.	LOUISVILLE KY
7	2SPEAD	Lexington test customers	Palomar Center Dri	
8	TEST3	RACHEL TEST 1		
9	TEST4	RACHEL TEST 2		
10	TEST6	DENNY TEST 1		
11	TEST7	JIM B TEST 1		
12	TEST8	JIM B TEST 2		
13	TEST9	Charlie Test		
14	TEST10	Murray's Test Customer		
15	TEST11	TESTTONY		
16	4JALTE	J. ALEX TEST KITCHEN	2609 WEST END AVE	NASHVILLE TN
17	5LAURE	LAUREN'S TEST CUST	1000 TEST DRIVE	CINCINNATI OH
18	CI-DEM	CI DEMATIC TEST CUSTOMER		

ACTIVE ONLY

CDS CONTACT:CHEF NAME AND CALL TIME ZIP CODE:40202

PHONE:PRIMARY PHONE FX: STORE ID:

Select: ☐ Chg layout Colors Config Contact Prospect Quit Search

Showall View

Then hit Enter.

Cfg=STD Modified CG Louisville S0S_OPT

Sales Header Entry

S/O no..... 12 Staged/Door. SUMMARY

Sales Order Search Options

1	Customer.....	TEST	TEST CUSTOMER AND USER
2	Customer category.....		
3	Order status.....		
4	Salesperson.....		
5	Include crew of salesperson.....	N	
6	Override crew.....		
7	Warehouses.....		
8	Include/exclude warehouses.....	I	
9	Ship via code.....		
10	Origination code.....		
11	Ship-to customer.....		
12	Customer credit codes.....		
13	Inc./excl. credits codes.....	I	
14	Date range.....	06/13/18	
15	Date type?.....	S	

(U)nshipped (S)hipped or transferred (0)nly shipped (A)ll

Hit Enter 3 more times. Now you will see this screen with all the orders placed for this account.

S/O no index		CG Louisville				SOS	
Sales Order Search							
S/O #	SHIP TO NAME		ST	ORD DATE	DLV DATE	ENT	TOTAL
1	04470895	1test (1234567890)	T	06/18/18	06/21/18	WEB	.00
2	04545849	1test (1234567890)	T	07/29/18	07/30/18	AHD	.00
3	04603671	1test (1234567890)	T	08/28/18	08/28/18	ASL	.00
4	04606924	1test (1234567890)	T	08/29/18	08/31/18	WEB	149.25
5	04657913	1test (1234567890)	T	09/24/18	09/25/18	ONP	.00
6	04718471	1test (1234567890)	T	10/23/18	10/23/18	REH	15.37
7	04745827	TEST CUSTOMER AND USER	T	11/06/18	11/06/18	PMW	273.59
8	04789618	TEST CUSTOMER AND USER	0	11/29/18	11/29/18	JVC	.00
9	04805982	TEST CUSTOMER AND USER	0	12/07/18	12/07/18	VC	.00
10							
11							
12							
13							
14							
15							
16							
17							
18							

Select: ☐ Chg_layout Config Find History index Lines Options Pick Products
Quit Refresh Route **Select** Showvoid

Here you can see the S/O # (invoice number), ST – Status. Here’s the different Status types:

T – Transferred to AR, O – Open, has not been shipped, or S – Shipped

You can make changes to a Shipped or Open order, but no changes can be made to a Transferred order.

You can choose a sales order, click enter and then open that sales order. Or you can hit “L” for Lines to see the items on the order.

S/O no index		CG Louisville				SOS	
Sales Order Search							
S/O #	SHIP TO NAME		ST	ORD DATE	DLV DATE	ENT	TOTAL
1	04470895	1test (1234567890)	T	06/18/18	06/21/18	WEB	.00
2	04545849	1test (1234567890)	T	07/29/18	07/30/18	AHD	.00
3	04603671	1test (1234567890)	T	08/28/18	08/28/18	ASL	.00
4	04606924	1test (1234567890)	T	08/29/18	08/31/18	WEB	149.25
5	04657913	1test (1234567890)	T	09/24/18	09/25/18	ONP	.00
6	04718471	1test (1234567890)	T	10/23/18	10/23/18	REH	15.37
7	04745827	TEST CUSTOMER AND USER	T	11/06/18	11/06/18	PMW	273.59
8	04789618	TEST CUSTOMER AND USER	0	11/29/18	11/29/18	JVC	.00
9	04805982	TEST CUSTOMER AND USER	0	12/07/18	12/07/18	VC	.00
10							
11							
12							
13							
14							
15							
16							
17							
18							

Select: ☐ Chg_layout Config Find History index Lines Options Pick Products
Quit Refresh Route **Select** Showvoid

S/O no index CG Louisville PD110

NOTE Sales Header Entry

S/O no.....04745827

B:6305551212 S:PRIMARYPHONE

SUMMARY	
12 Staged/Door.	Stat/lins.T 1
13 Warehouse.....CG	Product... 258.10
14 Trip Number...	Tax..... 15.49
15 Trms/Tax grp.. 0 KE	Invoice... 273.59
16 Reason code...	
17 Inv/Orig code.I	
18 Discount code.	

1 Customer...TEST

2 Ship to.....

3 Salesperson.CDS

4 Dlv Dt/Time.11/06/18

5 Pick date...11/06/18 PMW

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..BG28 5

10 Shp via/apt.D

11 A/R invoice.04745827

MISCELLANEOUS:

Total weight.. 29.000

Pkgs/plts. 5.00 0

Total cube.... 27.730

Ship date.....11/06/18 Margin....

Iv/Pk/Bl/Cs. 0 0 0 0 Margin %..

BILL TO				SHIP TO			
19 Test User				24 TEST CUSTOMER AND USER			
20				25			
21 1235 JEFFERSON ST.				26 1235 JEFFERSON ST.			
22				27			
23 LOUISVILLE KY 40202 USA				28 LOUISVILLE KY 40202 USA			

Select: [] Add Bol Charges ConfSale Entry Find index Invoice Lines Log Lookup
Last Map Mistakes Palletize Pick Quit Search Ship Stamp Trip View Void Print >

You can hit “E” for Entry to bring you to this screen to see what is on this sales order.

S/O no index CG Louisville PD114

NOTE Sales Header Entry

S/O no.....04745827

B:6305551212 S:PRIMARYPHONE

SUMMARY	
12 Staged/Door.	Stat/lins.T 1
13 Warehouse.....CG	Product... 258.10
14 Trip Number...	Tax..... 15.49
15 Trms/Tax grp.. 0 KE	Invoice... 273.59
16 Reason code...	
17 Inv/Orig code.I	

1 Customer...TEST

2 Ship to.....

3 Salesperson.CDS

4 Dlv Dt/Time.11/06/18

S/O Detail Entry

PRODUCT	DESCRIPTION	UN	QTY	LOT NO	SL	PRICE	TOTAL
MEABEF00016	BEEF-COW TENDER	70LB CS	5	#17046501		8.90	258.10

BEEF-COW TENDER FROZEN 70LB CS WOLVERINE F A29 09

2NDY PRICE LIST 2 / C0 .00 .0

C=Comments H=Charges #=Pounds B=Buy S=SRP O=Origin K=Pre-Pick F=Find M=More

If you need to add an item to this order, hit INSERT and then “s” enter to search for the item.

If you need to delete an item, hit DELETE. You will get a pop up that looks like this:

Are you sure you want to delete this line

YES

NO

The default is no. You will need to arrow up to Yes to delete the item.

How to add Pick instructions or comments

There may be instances where you need to add a special instruction for the pickers to hear when they pick an item. For instance, a customer wants green tip bananas. When you are entering the order on the profile, first enter the quantity, then hit enter twice. Next hit “c” for Comments

S/O:04844233-12/31/18-TEST CUSTOMER AND USER										**CHARGE**	
SEQN	DESCRIPTION	QTY	LOT	SL	PRICE	AVAIL	ON	HD			
10	APPLE - LOCAL WINESAP BUSHEL				39.25	18		18			
21	BANANAS - PREMIUM 00830 40 LB CS	1.00	~*****		27.95	16e		30			
30	SWEETENED CONDENSED MIL 14 OZ CAN				3.55	72		83			
40	4 OZ MICRO CILANTRO 4 OZ PACK				16.55	66		69			
50	CHERRY HEIRLOOM TOMATOES PINT				4.20	47		50			
60	TOMATO - HEIRLOOM 10 LB CASE				43.85	24		24			
70	GLUCOSE SYRUP 11 LB TUB				31.60	14		15			
80	CHOC - WHITE CALLETS CA 5.5LB BAG				39.50	20		20			
90	BEEF-BRISKET BLACK HAWK 18LB AVG				4.95	256		256			
100	FLOUR - WHITE RICE LB				1.75	42		42			
110	PRO-KAL 8 OZ DELI CONTAIN 500 CT				51.20	7		7			
120	GROUND, ELK FZ 10# CS				81.95	4e		4			
130	CREATE YOUR PROFILE FRO DELETE ME				1.4286	0		0			
150	APPLE - BABY MIXED 10 LB CASE				37.95	21		21			
160	ATLANTIC SALMON FILLET 4+ 4+LB LB				7.49	44		54			
180	OYSTERS - CHESAPEAKE'S 30 LB MED				66.99	79		88			
200	LIVE LOBSTERS 1.5 LB WC 1.6EA AVG				13.99	-49		-6			
210	HADDOCK FILLET WILD 1HAD LB				9.79	0		0			
220	3-5 CHEM-FREE CATFISH FI 10 LB CS				73.99	0		0			
230	BLUE SWIMMING CRAB LUMP 12 LB CS				235.99	84		85			
CN: LOCN: N D01 01										ACT COST	
PRICE SOURCE:2NDY PRICE LIST 4/C0										MARGIN %	
10300-BANA										.00	.0
F3=Review <space>=Prod srch +/-=Sequence C=Comments A=Attachments M=More											

This menu will be brought up.

S/O:04844356-01/02/19-TEST CUSTOMER AND USER										**CHARGE**	
SEQN	DESCRIPTION	QTY	LOT	SL	PRICE	AVAIL	ON	HD			
10	APPLE - LOCAL WINESAP BUSHEL				39.25	18		18			
21	BANANAS - PREMIUM 00830 40 LB CS	1.00	~*****		27.95	12e		30			
30	SWEETENED CONDENSED MIL 14 OZ CAN				3.55	70		83			
40	4 OZ MICRO CILANTRO 4 OZ PACK				16.55	65		69			
50	CHERRY HEIRLOOM TOMATOES PINT				4.20	47		50			
60	TOMATO - HEIRLOOM 10 LB CASE				43.85	24		24			
70	GLUCOSE SYRUP 11 LB TUB				31.60	13		15			
80	CHOC - WHITE CALLETS CA 5.5LB BAG				39.50	20		20			
90	BEEF-BRISKET BLACK HAWK 18LB AVG				4.95	256		256			
100	FLOUR - WHITE RICE LB				1.75	42		42			
110	PRO-KAL 8 OZ				51.20	7		7			
120	GROUND, ELK F				81.95	4e		4			
130	CREATE YOUR P				1.4286	0		0			
150	APPLE - BABY				37.95	21e		21			
160	ATLANTIC SALM				7.49	44		54			
180	OYSTERS - CHE				66.99	79		88			
200	LIVE LOBSTERS				13.99	21		64			
210	HADDOCK FILLE				9.79	0		0			
220	3-5 CHEM-FREE				73.99	0		0			
230	BLUE SWIMMING				235.99	84		85			
CN: LOCN: N D01										ACT COST	
PRICE SOURCE:2NDY										MARGIN %	
10300-BANA										.00	.0
F3=Review <space>=Prod srch +/-=Sequence C=Comments A=Attachments M=More											

SELECT TYPE

PRODUCT DESCRIPTION

BRAND

INVOICE INSTRUCTION

PICK TICKET INSTRUCTION

BILL OF LADING INSTRUCTION

PICK/INVOICE INSTRUCTION

PICK/B.O.L. INSTRUCTION

PICK/INVOICE/B.O.L. INSTRUCTION

MISCELLANEOUS COMMENT

Use the arrow key to go to “Pick Ticket Instruction” and hit enter.

SELECT TYPE

PRODUCT DESCRIPTION

BRAND

INVOICE INSTRUCTION

PICK TICKET INSTRUCTION

BILL OF LADING INSTRUCTION

PICK/INVOICE INSTRUCTION

PICK/B.O.L. INSTRUCTION

PICK/INVOICE/B.O.L. INSTRUCTION

MISCELLANEOUS COMMENT

Enter the comment. Please refrain from using any special characters (! & #, etc) as they are not recognized by our picking system, Dematic.

S/O:04844356-01/02/19-TEST CUSTOMER AND USER					***CHARGE**		
SEQ#	DESCRIPTION	QTY	LOT	SL	PRICE	AVAIL	ON HD
10					39.25	18	18
21	PICKING INSTRUCTION,.green tip				27.95	12e	30
30					3.55	70	83
40	4 OZ MICRO CILANTRO 4 OZ PACK				16.55	65	69
50	CHERRY HEIRLOOM TOMATOES PINT				4.20	47	50
60	TOMATO - HEIRLOOM 10 LB CASE				43.85	24	24
70	GLUCOSE SYRUP 11 LB TUB				31.60	13	15
80	CHOC - WHITE CALLETS CA 5.5LB BAG				39.50	20	20
90	BEEF-BRISKET BLACK HAWK 18LB AVG				4.95	256	256
100	FLOUR - WHITE RICE LB				1.75	42	42
110	PRO-KAL 8 OZ DELI CONTAIN 500 CT				51.20	7	7
120	GROUND, ELK FZ 10# CS				81.95	4e	4
130	CREATE YOUR PROFILE FRO DELETE ME				1.4286	0	0
150	APPLE - BABY MIXED 10 LB CASE				37.95	21e	21
160	ATLANTIC SALMON FILLET 4+ 4+LB LB				7.49	44	54
180	OYSTERS - CHESAPEAKE'S 30 LB MED				66.99	79	88
200	LIVE LOBSTERS 1.5 LB WC 1.6EA AVG				13.99	21	64
210	HADDOCK FILLET WILD 1HAD LB				9.79	0	0
220	3-5 CHEM-FREE CATFISH FI 10 LB CS				73.99	0	0
230	BLUE SWIMMING CRAB LUMP 12 LB CS				235.99	84	85
CN: LOCN: N D01 01					ACT COST		
PRICE SOURCE:2NDY PRICE LIST 4/CO					MARGIN %		
10300-BANA		.00		.00		.0	

How to Void an Order

After you have found the order you wish to void, use the arrow keys or hit “v” twice to highlight Void.
You can void any orders in Open status.

```
S/O no index          CG Louisville          PD110
Sales Header Entry    UNRELEASED
S/O no.....04882782  12 Stage/Dor.          SUMMARY
B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA    Stat/lins.0  1
1 Customer....TEST      14 Trip Number...    Product...   59.90
2 Ship to.....          15 Trms/Tax grp.. 0 KE Tax.....    3.59
3 Salesperson.CDS        16 Reason code...B0 Invoice...    63.49
4 Dlv Dt/Time.01/18/19   17 Inv/Orig code.I
5 Pick date...01/18/19   18 Discount code.
6 Cust Po 1...
7 Cust Po 2...
8 Cash?/Hold?.N N        Total weight..    4.000
9 Route/stop..BG28  5    Plt/pkgs..    .05  2.00
10 Shp via/apt.D          Total cube....    4.888
11 A/R invoice.           Ship date.....
                          Iv/Pk/Bl/Cf. 0 0 0 0 Margin %..

BILL TO                SHIP TO
19 Test User           24 TEST CUSTOMER AND USER
20                     25
21 1235 JEFFERSON ST.  26 1235 JEFFERSON ST.
22                     27
23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: [ ] Add Bol Charges Confsale Entry Find index Invoice Lines Log Lookup
Last Map Mistakes Order Palletize Pick QC Quit Search Ship Stamp Trip View Void->
```

Then arrow up to Void this sales order.

```
S/O no index          CG Louisville          PD110
Sales Header Entry    UNRELEASED
S/O no.....04882782  12 Stage/Dor.          SUMMARY
B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA    Stat/lins.0  1
1 Customer....TEST      14 Trip Number...    Product...   59.90
2 Ship to.....          15 Trms/Tax grp.. 0 KE Tax.....    3.59
3 Salesperson.CDS        16 Reason code...B0 Invoice...    63.49
4 Dlv Dt/Time.01/18/19   17 Inv/Orig code.I
5 Pick date...01/18/19
6 Cust Po 1...
7 Cust Po 2...
8 Cash?/Hold?.N N        Total weight..    .000
9 Route/stop..BG28  5    Plt/pkgs..    .00  .00
10 Shp via/apt.D          Total cube....    .888
11 A/R invoice.           Ship date.....
                          Iv/Pk/Bl/Cf. 0 0 0 0 Margin %..

Void options
Void this sales order
Abort

BILL TO                SHIP TO
19 Test User           24 TEST CUSTOMER AND USER
20                     25
21 1235 JEFFERSON ST.  26 1235 JEFFERSON ST.
22                     27
23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA
```

Next input a reason code. Hit “s” enter to search for available codes.

S/O no index CG Louisville PD110

S/O no.....04882782 Sales Header Entry UNRELEASED

B:6305551212 S:PRIMARYPHONE 12 Stage/Dor. SUMMARY

1 Customer....TEST 13 Warehouse....NA Stat/Lins.0 1

2 Ship to.... 14 Trip Number... Product... 59.90

3 Salesperson.CDS 15 Trms/Tax grp.. 0 KE Tax..... 3.59

4 Dlv Dt/Time.01/18/19 16 Reason code...B0 Invoice... 63.49

5 Pick date...01/18/19 17 Inv/Orig code.I

6 Cust Po 1... 18 Discount code.

7 Cust Po 2... Total weight.. 4.000

8 Cash?/Hold?.N N 2.00

9 Route/stop..BG28 5 Void reason code.. 4.888

10 Shp via/apt.D Margin....

11 A/R invoice. Iv/Pk/Bl/Cf. 0 0 0 0 Margin %..

BILL TO				SHIP TO			
19	Test User			24	TEST CUSTOMER AND USER		
20				25			
21	1235 JEFFERSON ST.			26	1235 JEFFERSON ST.		
22				27			
23	LOUISVILLE KY 40202 USA			28	LOUISVILLE KY 40202 USA		

Pick the reason code that applies.

S/O no index CG Louisville VRS_

S/O no.....04882782 Sales Header Entry UNRELEASED

B:6305551212 S:PRIMARYPHONE 12 Stage/Dor. SUMMARY

1 Customer....TEST 13 Warehouse....NA Stat/Lins.0 1

2 Ship to.... 14 Trip Number... Product... 59.90

3 Salesperson.CDS

4 Dlv Dt/Time.01/19

5 Pick date...01/19

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..BG28

10 Shp via/apt.D

11 A/R invoice.

Void Reason Codes	
CODE	DESCRIPTION
1	CL Customer Cancelled
2	OT OTHER:
3	QU Quality Discovered
4	SH Short Product
5	TS Sales Order Testing
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	

ACTIVE ONLY

Select: Config Find Quit Select Showall

Hit enter.

S/O no index	CG Louisville	PD110
S/O no.....04882782	Sales Header Entry	UNRELEASED
B:6305551212 S:PRIMARYPHONE	12 Stage/Dor.	SUMMARY
	13 Warehouse.....NA	Stat/lins.0 1
1 Cust	Void reason comments	Product... 59.90
2 Ship	ax grp.. 0 KE	Tax..... 3.59
3 Sales	code...B0	Invoice... 63.49
4 Dlv D	ig code.I	
5 Pick	nt code.	
6 Cust		
7 Cust	ght.. 4.000	
8 Cash?	. .05 2.00	
9 Route	e.... 4.888	
10 Shp v	Margin....
11 A/R i	Cf. 0 0 0 0	Margin %..

BILL TO				SHIP TO			
19	Test User			24	TEST CUSTOMER AND USER		
20				25			
21	1235 JEFFERSON ST.			26	1235 JEFFERSON ST.		
22				27			
23	LOUISVILLE KY 40202 USA			28	LOUISVILLE KY 40202 USA		

ESC=end text field F3=spell check

Enter comments if needed then hit escape.

How to find where a customer's truck is

One of the common questions you will get is, "Where's my truck?" Here's how to find this information.

Search for the customer's order using the directions outlined previously.

Once you have the order up, hit "T" for Trip

```
S/O no index          CG Louisville          PD110
Sales Header Entry
S/O no.....04880955  12 Stage/Dor.          SUMMARY
B:502-339-2206        13 Warehouse.....CG  Stat/lins.S    22
1 Customer....1JALEX  *JALEX*  14 Trip Number...00469084 Invoice...    430.37
2 Ship to.....  15 Trms/Tax grp..30 KY
3 Salesperson.LOU  16 Reason code...
4 Dlv Dt/Time.01/17/19  17 Inv/Orig code.1
5 Pick date...01/16/19 1BR  18 Discount code.
6 Cust Po 1...1807565
7 Cust Po 2...1807565    Total weight..    271.870
8 Cash?/Hold?.N N    Plt/pkgs..    .03    28.00
9 Route/stop..L061 291    Total cube....    22.794
10 Shp via/apt.D    Ship date....01/17/19    Margin....
11 A/R invoice.    Iv/Pk/Bl/Cf. 2 1    0 0 Margin %..

BILL TO                SHIP TO
19 J. ALEXANDERS        24 J. ALEXANDERS
20                      25
21 102 OXM00R COURT     26 102 OXM00R COURT
22                      27
23 LOUISVILLE KY 40222 28 LOUISVILLE KY 40222
Select: █ Add Airway Allo Attachments Bol Browse Charges Confsale Entry
Find indeX Invoice Label Lines Log Lookup Last Map Mistakes Notes Palletize
Passing Pick QC Quit Reprice Search Ship Stamp Standing Trip View Void >
```

This brings up the Trip Entry screen. Line 1 shows the route number. Line 7 shows the driver. Enter "U" for Update.

```
Trip number index      CG Louisville          PD090
Trip Entry
Trip...00469084 S Issue date...01/16/19
SUMMARY
1 Route code.....L061    Pallets out/in...    .16    .00
2 Description...11 HURSTONE 502.744.3588    Total packages...    181.00
3 Warehouse.....CG CG Louisville    Total/Max Wght...    1598.54    0
4 Dispatch date/time...01/17/19 07:12AM    Total/Max Cube...    101.04    0
5 Dispatch status / category...    Stops.....    15
6 Transport type / lane Id.....    Total/down hrs...    .00    .00
7 Driver/Phone..1BT Brian T 502-298-9785 5020-298-9785    Total gallons....    .000
8 Dispatcher....CLB Lamar Blake    Total sales..    4712.45
9 Carrier/name..    Other charges    .00
10 Reference #...
11 Tractor.....
12 Trailer.....
13 Refrig code/unit/setting...
14 Staging area / Door #.....
15 Comments.

Net margin...
Net %.....
Select: █ Add Asn Attachments Batchdoc Bol Build Charges Config Correspond
Directions Distance Equip Find indeX Invoice Log Lookup Map Modify Palletize
Picktrp Print QC Quit Route Search Ship Stops Update View Void Weight >
```

This screen shows the stops this driver has made and how the stops are ordered.

Stop number index

CG Louisville

PD092

Trip Entry

Trip...00469084 S Issue date...01/16/19

SUMMARY

Trip Update

TP	REFR	DESCRIPTION	ARRIVE/DEPART	OUT	IN	BOXS	STOP NOTES
S	04880889	MAGNOLIA SPRINGS SR.	07:32A 07:37A	0	0	0	
S	04880913	J. ALEXANDERS	08:10A 08:10A	0	0	0	
S	04880955	J. ALEXANDERS	08:10A 08:10A	0	0	0	
S	04881884	CALIFORNIA PIZZA KIT	08:40A 09:06A	0	0	0	
S	04881202	YANG KEE NOODLE #1 0	09:06A 09:06A	0	0	0	
S	04866514	BRISTOL EAST	09:45A 09:49A	0	0	0	
S	04880542	BRASSERIE PROVENCE	09:57A	0	0	0	
S	04881759	BRASSERIE PROVENCE	09:57A	0	0	0	
A	00717432	SOUTHEAST CHRISTIAN		0	0	0	
S	04881067	SOUTHEAST CHRISTIAN		0	0	0	
S	04882202	Z'S OYSTER BAR		0	0	0	
S	04881608	GUACA MOLE, INC		0	0	0	
S	04881747	HAVANA RUMBA MIDDLET		0	0	0	
S	04880667	COALS MIDDLETOWN		0	0	0	
S	04881613	COALS MIDDLETOWN		0	0	0	
S	04881973	FAT JIMMY'S SHELBYVI		0	0	0	
S	04880476	MICHAELIS EVENTS		0	0	0	
S	04880497	EL NOPALITO LAGRANGE		0	0	0	
S	04881678	EL NOPALITO LAGRANGE		0	0	0	

Arrival-Dock-Departure 01/17/19 01/17/19 01/17/19

I=In outS=Staging areaT=TemperatureD=Date & TimesE=sEal numberM=More

We can see that the driver has been to Magnolia Springs, J. Alexanders, California Pizza Kitchen, Yang Kee Noodle and Bristol East. He has arrived at Brasserie Provence and is still there. If you were speaking to someone from Southeast Christian, you could tell them that the driver is coming to them next. If you are speaking to someone from Havana Rumba Middletown, you can say, "the driver has 3 stops before coming to you". It is not a good practice to give out actual times as we have no way of knowing for sure when the driver will arrive. Several factors come into play here: traffic, how big the delivery is, if there are any problems, distance between stops, etc. You can make an estimate if the customer insists but be sure to tell the customer it is just an estimate.

How to make changes to a shipped invoice

All drivers will have a company cell phone with a Produce Pro app that allows them to check in to and depart from an account, make changes to an invoice (if an item was short or rejected by the customer) and the customer will sign the invoice via the driver app.

There will be times that a driver will not have a phone and will need to call in invoice changes. There are also certain accounts (most of them corporate accounts) who do not want their invoices changed and request that credits be entered for any changes.

We can only change invoices BEFORE the invoice has been signed by the customer (either the paper copy or on the app). We can NEVER make changes to signed invoices. Any changes once the invoice has been signed have to be adjusted as a credit.

Here's how to change an invoice when a driver calls in.

First, find the order that needs to be changed using the search procedure outlined above.

Then arrow over or hit "s" twice to get to Ship.

S/O no index CG Louisville PD110
Sales Header Entry

SUMMARY	
Stat/lins.S	4
Product...	101.90
Tax.....	6.11
Invoice...	108.01

1 Customer...TEST
2 Ship to.....
3 Salesperson.CDS
4 Dlv Dt/Time.01/17/19
5 Pick date...01/17/19 LMJ
6 Cust Po 1...
7 Cust Po 2...
8 Cash?/Hold?.N N
9 Route/stop..
10 Shp via/appt.D
11 A/R invoice.

12 Stage/Dor.
13 Warehouse....NA
14 Trip Number...
15 Trms/Tax grp.. 0 KE
16 Reason code...
17 Inv/Orig code.I
18 Discount code.

Total weight.. 33.000
Plt/pkgs.. .04 4.00
Total cube.... 5.696
Ship date....01/17/19 Margin...
Iv/Pk/Bl/Cf. 0 0 0 0 Margin %..

BILL TO				SHIP TO			
19 Test User				24 TEST CUSTOMER AND USER			
20				25			
21 1235 JEFFERSON ST.				26 1235 JEFFERSON ST.			
22				27			
23 LOUISVILLE KY 40202 USA				28 LOUISVILLE KY 40202 USA			

Select: [] Add Bol Charges Confsale Entry Find Index Invoice Lines Log Lookup
Last Map Mistakes Palletize Pick QC Quit Search Ship Stamp Trip View Void >

Let's say the Iceberg lettuce on this order was not on the truck. Once on the shipping screen, use the number keys to get to the iceberg lettuce. In this case the iceberg is line 2.

S/O no index CG Louisville PD121

Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

1 Customer...TEST 14 Trip Number... Product... 101.90

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	1.00	*****	17951005	
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	1.00	*****	17810305	
4	TOMATO - CULL 07082 25 LB CS C		1.00	1.00	*****	17981607	

LETHEAD24

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Enter 'L' to adjust late quantity

L=Late

Change the shipped quantity to 0. This will come up.

S/O no index CG Louisville PD121

Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

1 Customer...TEST 14 Trip Number... Product... 101.90

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	0	*****	17951005	
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	1.00	*****	17810305	
4	TOMATO - CULL 07082 25 LB CS C		1.00	1.00	*****	17981607	

Short-ship mistake code..

LETHEAD24

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

(S)earch

You will get to know the short ship codes, but if you need to find them, hit "s" enter to search.

S/O no index CG Louisville PD121
Sales Header Entry

S/O Short-ship mistake code

CODE	DESCRIPTION	BCK	ORD
CO	Customer Order Error	N	
CW	Catchweight issue	N	
DE	Data Entry Error	N	
DR	Driver Error	Y	
IN	Inventory not correct	Y	
MP	Marked pckd but not on trnsfr	Y	
NP	SHORT - PRODUCT NOT PROCESSED	N	
NS	Not Customer Spec	Y	
OA	ALERT! - OUT OF STOCK	Y	
OS	OUT OF STOCK	N	
PA	PRICE ADJUSTMENT	N	
PQ	Poor Quality	Y	
SD	Short at Delivery unknown why	Y	

SEARCH: (F3) Active only

LETHEAD24

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

SUMMARY			
Stat/Lins.S	4		
Product...	101.90		
PED	POUNDS	LOT	SL
1.00	*****	17956403	N0
1.00	*****	17951005	
1.00	*****	17810305	
1.00	*****	17981607	

Here's an explanation of each mistake code you will use.

CO – Customer Order Error – Customer did not intend to order this item or they have overordered and do not want this item.

DE – Data Entry Error – Someone within our organization has entered this incorrectly. This could be quantity or item

DR – Driver Error – The driver has made an error.

NS – Not Customer Spec – this item was not what the customer was expecting. The product may not be the desired ripeness, the desired cut, etc.

PA – Price Adjustment – the product was sent at the incorrect price. More will be told about this mistake code in the Entering Credits section

PQ – Poor Quality – this product is poor quality.

SD – Short at delivery – unknown why – This product was short and not on the truck.

TO – Missing Tote – An entire tote of product is missing.

TT – Transit Damage – this product is damaged

WP – Wrong Pick – We have sent the incorrect product

SD is for Short at Delivery. Because this product was not on the truck, choose this mistake code.

This is the next screen you will see.

S/O no index	CG Louisville	MSTENT
S/O no.....04882712	Sales Header Entry	
B:6305551212 S:PRIMARYPHONE	12 Stage/Dor.	SUMMARY
	13 Warehouse....NA	Stat/lins.S 4

SALES ORDER MISTAKE ENTRY

Date / status.....01/17/19 0

1 Mistake reason code.....

2 Override responsible.....

3

4

5

6

COMMENTS

Changed quantity.....

(C)alendar

Hit enter twice to be brought to the Comments section. Enter the appropriate comment and resolution for this issue.

S/O no index	CG Louisville	MSTENT
S/O no.....04882712	Sales Header Entry	
B:6305551212 S:PRIMARYPHONE	12 Stage/Dor.	SUMMARY
	13 Warehouse....NA	Stat/lins.S 4

SALES ORDER MISTAKE ENTRY

Date / status.....01/17/19 0

1 Mistake reason code.....SD Short at Delivery unknown why

2 Override responsible.....

3

4

5

6 Short. Customer needs tomorrow. Reason type(s): 0,P

Fault: LMJ

Changed quantity..... .00

20240 - LETTUCE - ICEBERG 04680 24 CT

ESC=end text field F3=spell check INS=save/load text

This is very important as this information can be searched in Ppro. If there is no further action required, please denote that.

Next, hit Escape twice.

S/O no index CG Louisville PD121

S/O no.....04882712

B:6305551212 S:PRIMARYPHONE

1 Customer...TEST

12 Stage/Dor.

13 Warehouse....NA

14 Trip Number...

SUMMARY

Stat/lins.S 4

Product... 101.90

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	.00	*****	*****	NA
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	1.00	*****	17810305	
4	TOMATO - CULL 0708			0	*****	17981607	

Sales order line:30

LETTUCE - ICEBERG 04680 24 CT

Back-order quantity.. 1.00

LETHEAD24

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

If the customer needs a backorder, hit enter.

In this screen, enter your 3 digit employee code then enter.

S/O no index CG Louisville ASTENT

S/O no.....04882712

B:6305551212 S:PRIMARYPHONE

1 Customer...TEST

12 Stage/Dor.

13 Warehouse....NA

14 Trip Number...

SUMMARY

Stat/lins.S 4

Product... 101.90

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	Full case pick						N0
2	Order:04882712						NA
3	EMP MLT NAME DATE START END HOURS						
4	lmj 1 01/17/19						

Assignment:

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

(S)earch __ Add Backorder Config Find Hold Label Mistakes Modify Origin Pallet

F11=Other

Ppro will bring up the next order in the system. If you are going to add to this order, just hit enter. If you need to pick a different day, arrow down to Yes, add a new order.

S/O no index CG Louisville PD121

Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA

1 Customer...TEST 14 Trip Number... Product... 101.90

Shipping Detail Entry

PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1 CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2 LETTUCE - ICEBERG 04680 24 CT C		1.00		*****	~*****	NA
3 POTATO - IDAHO 80CT				00	*****	17810305
4 TOMATO - CULL 07082				00	*****	17981607

Future orders for TEST CUSTOMER AND USER

S/O NO DLV DT CUST P.O. BCK ORD

04880521 02/02/22

YES, ADD A NEW ORDER

Select S.O. OR 'Y' to add a new order

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: ____ Add Backorder Config Find Hold Label Mistakes Modify Origin Pallet Prodfilter Quit Ship Stamp Subst Unshipallo

Then input the delivery date. Do not change the pick date or reason code. If you are entering the order for a future day, just hit enter through the route code. *If you are entering something for second run, you may need to change the route code. See the information regarding each region as to whether to change the route for second runs.*

S/O no index CG Louisville PD121

Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA

1 Customer...TEST 14 Trip Number... Product... 101.90

Shipping Detail Entry

PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1 CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2 LETTUCE - ICEBERG 04680 24 CT C		1.00		*****	~*****	NA
3 POTATO - IDAHO 80CT				00	*****	17810305
4 TOMATO - CULL 07082				00	*****	17981607

Back-order number:04882782

Press any key to acknowledge

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: ____ Add Backorder Config Find Hold Label Mistakes Modify Origin Pallet Prodfilter Quit Ship Stamp Subst Unshipallo

This screen shows you the backorder was entered and the invoice number associated with it. Press any key.

If you want to double check, hit "S" for Search to see all the orders entered for this account.

S/O no index CG Louisville PD110

S/O no.....04882712

B:6305551212 S:PRIMARYPHONE

1 Customer....TEST

2 Ship to.....

3 Salesperson.CDS

4 Dlv Dt/Time.01/17/19

5 Pick date...01/17/19 LMJ

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..

10 Shp via/apt.D

11 A/R invoice.

12 Stage/Dor.

13 Warehouse....NA

14 Trip Number...

15 Trms/Tax grp.. 0 KE

16 Reason code...

17 Inv/Orig code.I

18 Discount code.

Total weight.. 31.000

Plt/pkgs.. .01 3.00

Total cube.... 3.252

Ship date....01/17/19 Margin....

Iv/Pk/Bl/Cf. 0 0 0 0 Margin %..

19 Test User

20

21 1235 JEFFERSON ST.

22

23 LOUISVILLE KY 40202 USA

24 TEST CUSTOMER AND USER

25

26 1235 JEFFERSON ST.

27

28 LOUISVILLE KY 40202 USA

Select: ☐ Add Bol Charges Confsale Entry Find index Invoice Lines Log Lookup

Last Map Mistakes Palletize Pick QC Quit Search Ship Stamp Trip View Void >

Then hit enter 4 times to come to this screen.

S/O no index CG Louisville SOS

Sales Order Search

S/O #	SHIP TO NAME	ST	ORD DATE	DLV DATE	ENT	TOTAL
1 04545849	ltest (1234567890)	T	07/29/18	07/30/18	AHD	.00
2 04603671	ltest (1234567890)	T	08/28/18	08/28/18	ASL	.00
3 04606924	ltest (1234567890)	T	08/29/18	08/31/18	WEB	149.25
4 04657913	ltest (1234567890)	T	09/24/18	09/25/18	ONP	.00
5 04718471	ltest (1234567890)	T	10/23/18	10/23/18	REH	15.37
6 04745827	TEST CUSTOMER AND USER	T	11/06/18	11/06/18	PMW	273.59
7 04843453	TEST CUSTOMER AND USER	T	12/27/18	12/28/18	MM	.00
8 04843458	TEST CUSTOMER AND USER	T	12/27/18	12/29/18	MM	.00
9 04844669	TEST CUSTOMER AND USER	T	12/28/18	12/29/18	JRH	.00
10 04858842	TEST CUSTOMER AND USER	T	01/05/19	01/06/19	CDS	.00
11 04859344	TEST CUSTOMER AND USER	T	01/06/19	01/06/19	REH	.00
12 04862718	TEST CUSTOMER AND USER	T	01/07/19	01/07/19	DRD	.00
13 04880539	TEST CUSTOMER AND USER	S	01/16/19	01/17/19	CDS	.00
14 04882712	TEST CUSTOMER AND USER	S	01/17/19	01/17/19	LMJ	76.27
15 04882782	TEST CUSTOMER AND USER	0	01/17/19	01/18/19	LMJ	63.49
16 04880521	TEST CUSTOMER AND USER	0	01/16/19	02/02/22	DRD	.00
17						
18						

CUSTOMER P.O.:

Select: ☐ Chg_layout Colors Config Find History index Lines List Options Pick

Products Quit Refresh Select Showvoid >

You can now see the order that has a delivery date of 01/18/19. That is the backordered iceberg lettuce. You can hit enter on that order to see it or hit "L" for lines to see what products are on the order.

The driver may also request to change the quantity of a shipped item. For instance, the customer ordered 1 case of 80 ct potatoes, but the driver had an extra case on the truck and the customer would like to have the extra case. Once on the order, hit "s" twice for Ship to bring up this screen.

S/O no index CG Louisville PD121

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

1 Customer...TEST 14 Trip Number... Product... 71.95

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	.00	*****	*****	NA
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	1.00	*****	17810305	
4	TOMATO - CULL 07082 25 LB CS C		1.00	1.00	*****	17981607	

POT80

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Enter 'L' to adjust late quantity

L=Late

Then change the shipped quantity to 2.

S/O no index CG Louisville PD121

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

1 Customer...TEST 14 Trip Number... Product... 71.95

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	1.00	*****	17956403	N0
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	.00	*****	*****	NA
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	2.00	*****	17810305	
4	TOMATO - CULL 07082 25 LB CS C		1.00	1.00	*****	17981607	

POT80

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

(S)earch (M)ultiple pa(L)lets (P)allet ID (C)ontainer (V)endlot

Then give the driver the new invoice total by hitting escape to go back to the order screen. The new total is in the top right corner.

S/O no index CG Louisville PD110

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA

1 Customer....TEST 14 Trip Number...

2 Ship to.... 15 Trms/Tax grp.. 0 KE

3 Salesperson.CDS 16 Reason code...

4 Dlv Dt/Time.01/17/19 17 Inv/Orig code.I

5 Pick date...01/17/19 LMJ 18 Discount code.

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..

10 Shp via/apr.D

11 A/R invoice.

Total weight.. 33.000

Plt/pkgs.. .01 4.00

Total cube.... 4.636

Ship date....01/17/19

Iv/Pk/Bl/Cf. 0 0 0 0

Margin....

Margin %..

19 Test User 24 TEST CUSTOMER AND USER

20 25

21 1235 JEFFERSON ST. 26 1235 JEFFERSON ST.

22 27

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: ☐ Add Bol Charges Confsale Entry Find index Invoice Lines Log Lookup

Last Map Mistakes Palletize Pick QC Quit Search Ship Stamp Trip View Void >

There may be times where a customer does not want a whole case of a product and only wants a partial case. Go back into the ship screen. For this example, the customer only wanted 10 cucumbers, not the whole case.

On line 1, change the shipped quantity to 0.

S/O no index CG Louisville PD121

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor.

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA

1 Customer....TEST 14 Trip Number...

2 Ship to....

3 Salesperson.CDS

4 Dlv Dt/Time.01/17/19

5 Pick date...01/17/19 LMJ

6 Cust Po 1...

7 Cust Po 2...

8 Cash?/Hold?.N N

9 Route/stop..

10 Shp via/apr.D

11 A/R invoice.

Total weight.. 33.000

Plt/pkgs.. .01 4.00

Total cube.... 4.636

Ship date....01/17/19

Iv/Pk/Bl/Cf. 0 0 0 0

Margin....

Margin %..

19 Test User 24 TEST CUSTOMER AND USER

20 25

21 1235 JEFFERSON ST. 26 1235 JEFFERSON ST.

22 27

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: ☐ Add Bol Charges Confsale Entry Find index Invoice Lines Log Lookup

Last Map Mistakes Palletize Pick QC Quit Search Ship Stamp Trip View Void >

Shipping Detail Entry

	PRODUCT				ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370	24	CT	CS	C	1.00	0	1.00	***** 17956403 N0
2	LETTUCE - ICEBERG 04680	24	CT	C	C	1.00	.00	***** ~***** NA	
3	POTATO - IDAHO 80CT 06020	CASE	C			1.00	2.00	***** 17810305	
4	TOMATO - CULL 07082	25	LB	CS	C	1.00	1.00	***** 17981607	
5									
6									
7									
8									
9									
10									
11									
12									
13									

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Enter 'L' to adjust late quantity

L=Late

Use the CO – Customer Order Error as the mistake code and input the comment.

S/O no index CG Louisville MSTENT

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor. SUMMARY

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

SALES ORDER MISTAKE ENTRY

Date / status.....01/17/19 0

1 Mistake reason code.....C0 Customer Order Error

2 Override responsible.....

3

4

5

COMMENTS

6 Customer only wants 10 each. Adding Reason type(s): 0
back to the invoice. █

Fault:

Changed quantity..... .00

20049 - CUCUMBERS 04370 24 CT CS

ESC=end text field F3=spell check INS=save/load text

Hit escape twice to get back to the ship screen then "A" for Add

S/O no index CG Louisville PD121

MISTAKE Sales Header Entry

S/O no.....04882712 12 Stage/Dor. SUMMARY

B:6305551212 S:PRIMARYPHONE 13 Warehouse....NA Stat/lins.S 4

1 Customer....TEST 14 Trip Number... Product... 100.45

Shipping Detail Entry

	PRODUCT	S	ORDERED	SHIPPED	POUNDS	LOT	SL
1	CUCUMBERS 04370 24 CT CS C		1.00	.00	*****	~*****	NA
2	LETTUCE - ICEBERG 04680 24 CT C		1.00	.00	*****	~*****	NA
3	POTATO - IDAHO 80CT 06020 CASE C		1.00	2.00	*****	17810305	
4	TOMATO - CULL 07082 25 LB CS C		1.00	1.00	*****	17981607	
5							
6							
7							
8							
9							
10							
11							
12							
13							

23 LOUISVILLE KY 40202 USA 28 LOUISVILLE KY 40202 USA

Select: █ Add Backorder Config Find Hold Label Mistakes Modify Origin Pallet
Prodfilter Quit Ship Stamp Subst Unshipallo

This screen comes up.

S/O no index		CG Louisville	PD111
MISTAKE		Sales Header Entry	
S/O no.....04882712	12 Stage/Dor.	SUMMARY	
B:6305551212 S:PRIMARYPHONE	13 Warehouse....NA	Stat/lins.S	4
1 Customer....TEST	14 Trip Number...	Product...	100.45
S/O NUMBER: 04882712		TEST-Test User	
Line.....	50 C		
1 Product.....			
2 Unit of measure...			
3 Order quantity...	.00		
4 Lot number.....			
5 Unit price.....	.0000		
6 Estimated price...	.0000		
PRICED OUT			
7 Description.....			
8 Brand / cond.....			
9 Picking Instr....			
10 Invoice Instr....			
11 Product tax code..			
Tax pcnt 1 / 2....	.000 .000		
Price source.....	NOT DEFINED	12 Weight....	.00
		Stat/batch/substitute.C	0
SHIP BY:LMJ			
(S) to search, (@) to view ads			

Enter the product in line 1. You can search for the product by hitting "s" enter. Enter the quantity in line 3.

S/O no index		CG Louisville	PD111
MISTAKE		Sales Header Entry	
S/O no.....04882712	12 Stage/Dor.	SUMMARY	
B:6305551212 S:PRIMARYPHONE	13 Warehouse....NA	Stat/lins.S	4
1 Customer....TEST	14 Trip Number...	Product...	100.45
S/O NUMBER: 04882712		TEST-Test User	
Line.....	60 C CG		
1 Product.....	CUCSELECTEA		
2 Unit of measure...			
3 Order quantity...	10 .00		
4 Lot number.....	CG		
5 Unit price.....	1.0900		
6 Estimated price...	.0000		
PRICED OUT			
7 Description.....	CUCUMBERS - SELECT	EA	
8 Brand / cond.....			
9 Picking Instr....			
10 Invoice Instr....			
11 Product tax code..			
Tax pcnt 1 / 2....	6.000 .000		
Price source.....	PRICE LIST 3 / CO	12 Weight....	.00
		Stat/batch/substitute.C	0
SRP: 1 EA @ 1.09 0% SHIP BY:LMJ			

Continue hitting enter until you get back to the ship screen. Then hit escape.

To see the changes, you can hit E for Entry.

S/O no index	CG Louisville	PD114
MISTAKE	Sales Header Entry	
S/O no.....04882712	12 Stage/Dor.	SUMMARY
B:6305551212 S:PRIMARYPHONE	13 Warehouse....NA	Stat/lins.S 5
1 Customer....TEST	14 Trip Number...	Product... 93.40
2 Ship to.....	15 Trms/Tax grp.. 0 KE	Tax..... 5.60
3 Salesperson.CDS	16 Reason code...	Invoice... 99.00
4 Dlv Dt/Time.01/17/19	17 Inv/Orig code.I	
S/O Detail Entry		
PRODUCT	DESCRIPTION	UN QTY LOT NO SL PRICE TOTAL
CUC24	CUCUMBERS 04370 24 CT CS	0 ~***** NA 17.95 .00
TOMCULL	TOMATO - CULL 25 LB CS	1 17981607 25.50 25.50
LETHEAD24	LETTUCE - ICEBERG 24 CT	0 ~***** NA 29.95 .00
POT80	POTATO - IDAHO 80CT CASE	2 17810305 28.50 57.00
CUCSELECTEA	CUCUMBERS - SELECT EA	10 X4875726 1.09 10.90
CUCUMBERS 04370 24 CT CS N E33 01		
PRICE LIST 3 / C0 .00 .0		
C=Comments H=Charges #=Pounds B=Buy S=SRP O=Origin K=Pre-Pick F=Find M=More		

You can see that the Cucumbers by the case are now at 0 and 10 of the Cucumbers – Select – EA have been added. All our products are more expensive by the “each” than by the case.

Credits

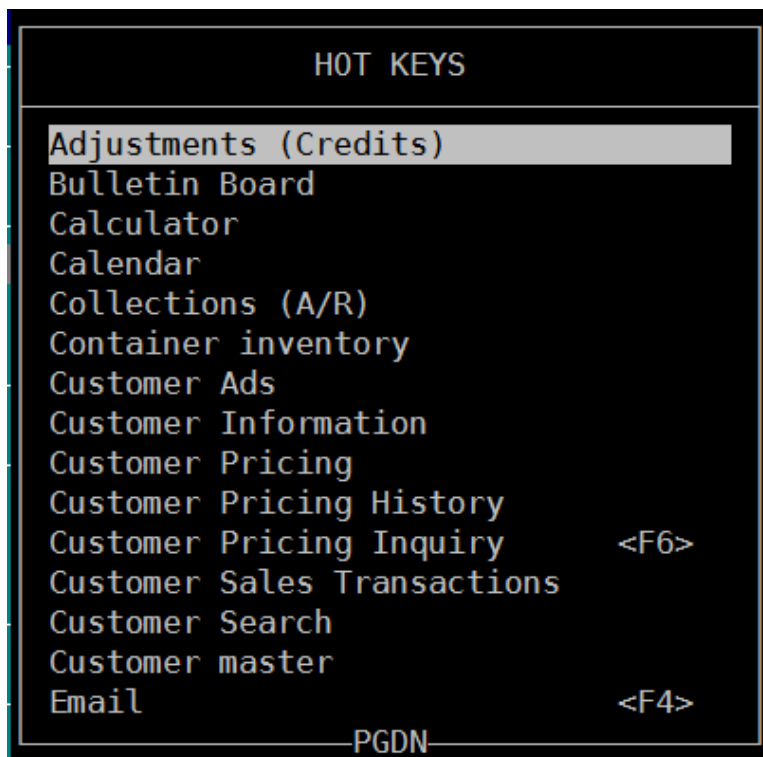
There will be times when a customer will need credit for items they have purchased. Here are some things to keep in mind about credits.

- WOW Center agents are only able to enter credits for the same day. Accounting must enter any credit from previous days
- RMA vs. Credit. An RMA (Return Merchandise Authorization) is entered if a product needs to be picked up and returned to us. A credit is issued if the product will not be picked up.
- Any frozen item that is returned must have been kept frozen. It cannot be thawed.
- Products must be returned in their original packaging and must be the full amount.
- Any previous day credits or RMA's for seafood must be approved by the seafood team.
- Any credits or RMA's for meat items must be approved by the meat team.
- Use good judgement and ask questions when necessary. Will we give credit on lettuce from a week ago? Probably not. Will we give credit or pick up paper cups that have not been opened from a week or more prior? Probably. Many things factor in to whether a credit can be given. Ask questions.

RMA Entry

RMA's are issued when the product will be picked up and returned to our warehouse. Credit is not given to the customer until the product has been received in our warehouse. A customer will not see an immediate credit when issued an RMA.

To enter an RMA, hit F9 while on any screen and then enter to go to Adjustments (Credits)



Hit "r" for RMA or use the arrow keys.

Adjustment number index CG Louisville PD100
Adjustment Header Entry

Adjustment....	ENTERED	SUMMARY
1 Customer.....	Date.....	Status.....
2 Cust refr.....	Time.....	Credit slip..
3 A/R invce.....	Operator..	RMA slip.....
4 Route date....	EFFECTIVE	
5 Route/stop....	11 Date.....	Amount.....
6 Invoice code..	Time.....	Tax.....
7 Cash?/Hold?..	Received..	Total.....
8 Return inv. to whse..	VERIFIED	Curr exch...
9 Trip.....	Date.....	Net.....
10 Contact...	Time.....	
	Operator..	Lines.....
		Ret. items..
		Ret. weight.
Sales order/Net.		
BILL TO		SHIP TO
12	16	
13	17	
14	18	
15	19	

Select: █ Add Ar Config Find History index Lookup Modify Page Quit Rma
Search View

Hit "s" enter to search for the customer.

Adjustment number index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1	<div>Enter search fields</div> <div>Name..test█</div> <div>At least 3 consecutive non-blank chars</div>			
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

ACTIVE ONLY

Arrow down to the customer and hit enter.

Adjustment number index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1	2SPEAD	Lexington test customers	Palomar Center Dri	
2	4LOG16	LOGANS TEST KITCHEN	2981 SIDCO DR	NASHVILLE TN
3	TEST10	Murray's Test Customer		
4	4TEST1	NASH TEST LEVEL 1		
5	4TEST2	NASH TEST LEVEL 2		
6	4TEST3	NASH TEST LEVEL 3		
7	4TEST4	NASH TEST LEVEL 4		
8	000007	PPRO TESTING CUSTOMER	testing address	testing city IL
9	TEST3	RACHEL TEST 1		
10	TEST4	RACHEL TEST 2		
11	RANDY1	RANDY TEST 1		
12	RANDY2	RANDY TEST 2		
13	TEST16	SHARON TEST		
14	7TEST	SPRINGFIELD TEST LEVEL 1		
15	TESTCS	test chanel		
16	TEST	TEST CUSTOMER AND USER	1235 JEFFERSON ST. LOUISVILLE	KY
17	LINDI1	TEST LINDI	Sutton's Test	
18	TEST17	TEST SARAH RE		

ACTIVE ONLY

CDS CONTACT:CHEF NAME AND CALL TIME ZIP CODE:40202

PHONE:PRIMARY PHONE FX: STORE ID:

Select: Chg Layout Colors Config Contact Filter index List Prospect Quit

Search Select Showall

You do not need to add anything in the Cust refr field. Hit enter to go through that field.

Adjustment number index CG Louisville PD100

Adjustment Header Entry

Adjustment....	*RMA	ENTERED	SUMMARY
1 Customer.....TEST		Date.....01/17/19	Status.....0
2 Cust refr.....		Time.....	Credit slip.. 0
3 A/R invce.....		Operator..LMJ	RMA slip..... 0
4 Route date....		EFFECTIVE	
5 Route/stop....	11	Date.....01/17/19	Amount..... .00
6 Invoice code..I		Time.....	Tax..... .00
7 Cash?/Hold?...N		Received..	Total..... .00
8 Return inv. to whse..		VERIFIED	Curr exch... .00
9 Trip.....		Date.....	Net..... .00
10 Contact....		Time.....	
		Operator..	Lines..... 0
			Ret. items.. .00
Sales order/Net.....			Ret. weight.. .000
BILL TO		SHIP TO	
12 Test User		16 TEST CUSTOMER AND USER	
13 1235 JEFFERSON ST.		17 1235 JEFFERSON ST.	
14		18	
15 LOUISVILLE KY 40202 USA		19 LOUISVILLE KY 40202 USA	

Enter the credit instructions.

Adjustment number index CG Louisville PD100

Adjustment Header Entry

Reference: Customer:TEST TEST CUSTOMER AND USER

1 Credit type code.....

CREDIT INSTRUCTIONS

2 Poor quality tomatoes..

Customer will reorder.

Next, hit Escape to be brought to this screen.

```

Adjustment number index          CG Louisville                     PD100
Adjustment Header Entry

Adjustment....      *RMA      ENTERED      SUMMARY
Date.....01/17/19      Status.....0
Time.....      Credit slip..  0
Operator..LMJ      RMA slip....  0
EFFECTIVE
11 Date.....01/17/19      Amount.....      .00
Time.....      Tax.....      .00
Received.....      Total.....      .00
VERIFIED
7 Cash?/Hold?...N N      Curr exch...      .00
8 Return inv. to whse..      Date.....      .00
9 Trip.....      Time.....
Operator..      Lines.....  0
Ret. items..      .00
Ret. weight..      .000
Sales order/Net.....
BILL TO      SHIP TO
12 Test User      16 TEST CUSTOMER AND USER
13 1235 JEFFERSON ST.      17 1235 JEFFERSON ST.
14      18
15 LOUISVILLE      KY 40202      USA      19 LOUISVILLE      KY 40202      USA

Select: 0 Add Ar Chgs Config Entire Find Flat History index In out Lines Log
Lookup Modify Notes Page Print Quit Receive Rma Search Stamp Verify View Void

```

Hit enter to be taken to the Lines. This is the default.

[illegible]

Hit "s" enter to search for the sales order number.

I will be entering a credit on the tomatoes from the order delivered on 01/17/19. Arrow to that sales order and hit enter.

Next search for the line on the sales order by hitting “s” enter.

Arrow to the tomatoes.

Hit enter.

Enter the quantity.

You do not have to enter anything in the Adjustment Instructions. Just enter through.

Continue hitting enter to get to this comment field.

Enter the comment with the resolution.

```

Adjustment number index          CG Louisville          MSTNT
Adjustment Header Entry
Adjustment....00717504  *RMA      ENTERED      SUMMARY
SALES ORDER MISTAKE ENTRY
Date / status.....01/17/19   0
1 Mistake reason code.....PQ Poor Quality
2 Override responsible.....
3 .....
4 .....
5 .....
COMMENTS
6 Poor quality. Customer will reorder.  Reason type(s): Q,P
Fault: ST,LMJ
Changed quantity.....      .00
50000 - TOMATO - CULL 07082      25 LB CS
ESC=end text field  F3=spell check  INS=save/load text

```

[illegible]

The credit entry process is the same as the RMA process except when you get to the Adjustment Header Entry after hitting F9, hit "A" for Add instead of "R" for RMA. All other steps are the same.

```

Adjustment number index          CG Louisville          PD100
                                Adjustment Header Entry

Adjustment....                  ENTERED                  SUMMARY
                                Date.....          Status.....
1 Customer.....                Time.....          Credit slip..
2 Cust refr.....              Operator..          RMA slip....
3 A/R invce.....              EFFECTIVE
4 Route date....              11 Date.....          Amount.....
5 Route/stop....              Time.....          Tax.....
6 Invoice code..              Received..          Total.....
7 Cash?/Hold?...              VERIFIED            Curr exch...
8 Return inv. to whse..       Date.....          Net.....
9 Trip.....                  Time.....
10 Contact...                 Operator..          Lines.....
                                Ret. items..
                                Ret. weight.

Sales order/Net.
  BILL TO                      SHIP TO

12                               16
13                               17
14                               18
15                               19

Select: █ Add Ar Config Find History index Lookup Modify Page Quit End
        Search View

```

You can also search for credits. To do this hit F9 and enter to be brought to the Adjustment Header Entry screen.

Adjustment number index		CG Louisville		PD100
Adjustment Header Entry				
Adjustment....	ENTERED	SUMMARY		
1 Customer.....	Date.....	Status.....		
2 Cust refr.....	Time.....	Credit slip..		
3 A/R invce.....	Operator..	RMA slip.....		
4 Route date....	EFFECTIVE			
5 Route/stop....	11 Date.....	Amount.....		
6 Invoice code..	Time.....	Tax.....		
7 Cash?/Hold?..	Received..	Total.....		
8 Return inv. to whse..	VERIFIED	Curr exch...		
9 Trip.....	Date.....	Net.....		
10 Contact...	Time.....			
	Operator..	Lines.....		
Sales order/Net.		Ret. items..		
BILL TO		Ret. weight.		
		SHIP TO		
12	16			
13	17			
14	18			
15	19			

Select: Add Ar Config Find History index Lookup Modify Page Quit Rma Search View

Hit "s" for Search.

Adjustment number index		CG Louisville		PD100
Adjustment Header Entry				
Adjustment....	ENTERED	SUMMARY		
1 Customer.....	Date.....	Status.....		
2 Cust refr.....	Time.....	Credit slip..		
3 A/R invce.....	Operator..	RMA slip.....		
4 Route date....	EFFECTIVE			
5 Route/stop....	11 Date.....	Amount.....		
6 Invoice code..	Time.....	Tax.....		
7 Cash?/Hold?..	Received..	Total.....		
8 Return inv. to whse..	VERIFIED	Curr exch...		
9 Trip.....	Date.....	Net.....		
10 Contact...	Time.....			
	Operator..	Lines.....		
Sales order/Net.		Ret. items..		
BILL TO		Ret. weight.		
		SHIP TO		
12	16			
13	17			
14	18			
15	19			

Select: Add Ar Config Find History index Lookup Modify Page Quit Rma Search View

And "s" enter to search for the customer.

Adjustment number index CG Louisville PD100
Adjustment Header Entry

Adjustment....	ENTERED	SUMMARY
1 Customer.....	Date.....	Status.....
2 Cust refr.....	Time.....	Credit slip..
3 A/R invce.....	Operator..	RMA slip.....
4 Route date....	EFFECTIVE	
5 Route/stop....	11 Date.....	Amount.....
6 Invoice code..	Time.....	Tax.....
7 Cash?/Hold?...	Received..	Total.....
8 Return inv. to whse..	VERIFIED	
9 Trip.....	Date.....	Curr exch...
10 Contact...	Time.....	Net.....
	Operator..	Lines.....
Sales order/Net.		Ret. items..
		Ret. weight.
12 BILL TO	16	SHIP TO
13	17	
14 CUSTOMER..s	18	
15	19	

Let's see what credits Jack Fry's has in the system.

Adjustment number index		CG Louisville		ADJSRCH
Credit Header Search				
CREDIT	CUSTOMER	S	EFFECT	TOTAL CUSTOMER REFR
1	00712725 JACK FRY'S	T	11/30/18	-12.25
2	00712739 JACK FRY'S	T	11/30/18	-12.25
3	00713617 JACK FRY'S	V	01/05/19	.00 s
4	00713618 JACK FRY'S	T	12/08/18	-12.25 s
5	00714075 JACK FRY'S	T	12/13/18	-12.25 s
6	00714374 JACK FRY'S	V	12/18/18	-108.68
7	00714451 JACK FRY'S	T	12/18/18	-67.10
8	00714453 JACK FRY'S	T	12/18/18	-24.50
9	00714560 JACK FRY'S	S	12/19/18	.00
10	00714563 JACK FRY'S	T	12/19/18	-160.95
11	00714825 JACK FRY'S	T	12/21/18	-8.11
12	00714949 JACK FRY'S	V	01/05/19	.00
13	00714950 JACK FRY'S	T	12/26/18	-24.50
14	00715419 JACK FRY'S	T	12/31/18	-127.89
15	00715649 JACK FRY'S	T	01/03/19	-97.43
16	00716559 JACK FRY'S	S	01/09/19	.00
17	00716560 JACK FRY'S	T	01/09/19	-9.75
18	00716561 JACK FRY'S	T	01/09/19	-27.95
JACK FRY'S, 1007 BARDSTOWN RD., LOUISVILLE, KY				
Select: <input type="checkbox"/> Config History Lines Quit Salesperson <input type="checkbox"/> Select				

You can select any credit to see it or hit "L" for Lines to see the products on the credit.

You can see the item on the bottom of the screen.

Adjustment number index		CG Louisville		AJD	
Credit Header Search					
CREDIT	CUSTOMER	S	EFFECT	TOTAL	CUSTOMER REFR
1	00712725 JACK FRY'S	T	11/30/18	-12.25	
2	00712739 JACK FRY'S	T	11/30/18	-12.25	
3	00713617 JACK FRY'S	V	01/05/19	.00	s
Applied Credits					
CREDIT	LINE TY	PRODUCT	LOT #	SL	QUANTITY
1	00716561	10 R	GREKALE	17815101	1.00
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
20311-GREKALE GREENS - KALE 04650 24 CT CS					
S/O: 04861435 LINE: 10 REASON: Not Customer Spec					
Select: Barlabel Config Print Quit Select Verify					

If a customer would like a copy of this credit, enter onto the desired credit to bring it up and hit "P" for Print.

Adjustment number index		CG Louisville		PD100	
Adjustment Header Entry					
Adjustment....00716561 *RMA		ENTERED		SUMMARY	
Date.....01/09/19		Status.....T		I13796	
Time.....08:45AM		Credit slip..		2	
Operator..VC		RMA slip....		1	
EFFECTIVE					
Date.....01/09/19		Amount.....		-27.95	
Time.....02:38PM		Tax.....		.00	
Received..1ML		Total.....		-27.95	
VERIFIED		Curr exch...		.00	
Date.....		Net.....		-27.95	
Time.....		Lines.....		1	
Operator..		Ret. items..		1.00	
Sales order/Net.04861435		Ret. weight.		2.000	
BILL TO		SHIP TO			
12 JACK FRY'S		16 JACK FRY'S			
13 1007 BARDSTOWN RD.		17 1007 BARDSTOWN RD.			
14		18			
15 LOUISVILLE KY 40204		19 LOUISVILLE KY 40204			
Select: Add Ar Attachments Chgs Config Entire Find Flat index Labels Lines					
Log Lookup Modify Print Quit Receive Rma Search Stamp Verify View Void >					

A default printer is shown. However, there are many options for printing. Hit "s" enter to search for printers.

Adjustment number index CG Louisville PD100
Adjustment Header Entry

Adjustment....00716561	*RMA	ENTERED	SUMMARY
1 Customer.....1JACKF	Date.....01/09/19	Status.....T	I13796
2 Cust refr.....	Time.....08:45AM	Credit slip.. 2	
3 A/R invce.....	Operator..VC	RMA slip..... 1	
4 Route date...01/09/19	EFFECTIVE		
5 Route/stop....L054 997	11 Date.....01/09/19	Amount.....	-27.95
6 Invoice code..1	Time.....02:38PM	Tax.....	.00
7 Cash?/Hold?...N N	Received..IML	Total.....	-27.95
8 Return inv. to whse..	VERIFIED	Curr exch...	.00
9 Trip.....00467442	Date.....	Net.....	-27.95
10 Contact...	Time.....		
	Operator..	Lines..... 1	
Sales order/Net.04861435	215.69	Ret. items..	1.00
		Ret. weight.	2.000
BILL TO		SHIP TO	
12 JACK FRY'S	16 JACK FRY'S	RDSTOWN RD.	
13			
14 CREDIT DESTINATION..sNVRROUTE2			
15		LLE KY 40204	

(S)earch

Each region has its own printer. You can also email a copy to the customer. Find the EMAIL EMAIL PDF PRINTER.

Adjustment number index CG Louisville PD100
Adjustment Header Entry

Adj	PRINTER	DESCRIPTION	CLASS	COMPANY	SUMMARY
1 Cus	EMAIL	EMAIL PDF PRINTER			..T I13796
2 Cus	EMAILCON	EMAIL PDF PRINTER			.. 2
3 A/R	EMAILU	UNATTENDED EMAIL PDF PRINTER			.. 1
4 Rou	EMAIL_RTF	EMAIL RTF FILE (MICROSOFT WORD			
5 Rou	FAX	attended fax with no cover			-27.95
6 Inv	FAXCOVER	Attended fax printer W/ cover			.00
7 Cas	FAXU	unattended fax with no cover			-27.95
8 Ret	HPBACKUP				.00
9 Tri	HPLASER	HP LASERJET PRINTER			-27.95
10 Con	HPLASERLND	HP LASERJET PRINTER (LANDSCAPE			
	INDY				1
	INVAARON	2 COPIES NASHVILLE			1.00
	INVOICE	KYOCERA INVOICE PRINTER (2 COP			2.000
SEARCH: (F3) Active only					
12 JACK FRY'S	16 JACK FRY'S	RDSTOWN RD.			
13					
14 CREDIT DESTINATION..sNVRROUTE2					
15		LLE KY 40204			

A list of emails in Ppro that are attached to the account will come up.

Adjustment number index	CG Louisville	PD100
Adjustment Header Entry		
Adjustmen	Select Email Recipients	MMARY
1 Customer.	CREDIT PRINT OPTIONS	.T I13796
2 Cust refr	Contact Type ()	. 2
3 A/R invce	Customer : JACK FRY'S (1JACKF)	. 1
4 Route dat	SRCE CONTACT EMAIL ADDRESS	
5 Route/sto	> CM stacy@jackfrys.com	-27.95
6 Invoice c	> CM kitchen@jackfrys.com	.00
7 Cash?/Hol	> CM steve@jackfrys.com	-27.95
8 Return in	CM kitchen@jackfrys.com	.00
9 Trip.....		-27.95
10 Contact..		1
Sales ord		1.00
		2.000
12 JACK FRY'S		
13 1007 BARD		
14	Enter 'SPACE' to Select/Deselect	
15 LOUISVILL		0204

Use the space bar to select/deselect an email address. If the email address is not listed, deselect all. Hit enter. In this example, I deselected all of the available email addresses and will send this to myself.

Adjustment number index	CG Louisville	PD100
Adjustment Header Entry		
Adjustment....00716561	*RMA	SUMMARY
ENTERED		
Enter Email Destination		
Mail Address..		
Subject.....		
Comment.....		
10 Contact...	Operator..	Lines..... 1
Sales order/Net.04861435	215.69	Ret. items.. 1.00
		Ret. weight. 2.000
BILL TO		SHIP TO
12 JACK FRY'S	16 JACK FRY'S	
13 1007 BARDSTOWN RD.	17 1007 BARDSTOWN RD.	
14	18	
15 LOUISVILLE KY 40204	19 LOUISVILLE KY 40204	
Select: (O)perator, (B)ook, (G)roup, (M)aintain, or (C)lear		

Enter the email address and subject line. You can also enter a comment if necessary.

Adjustment number index		CG Louisville		PD100
Adjustment Header Entry				
Adjustment....00716561	*RMA	ENTERED	SUMMARY	
Enter Email Destination				
Mail Address...ljones@whatchefswant.com				
Subject.....Jack Fry's Credit				
Comment.....				
10 Contact...	Operator...	Lines.....	1	
Sales order/Net.04861435	215.69	Ret. items..	1.00	
BILL TO		Ret. weight.	2.000	
12 JACK FRY'S		SHIP TO		
13 1007 BARDSTOWN RD.		16 JACK FRY'S		
14		17 1007 BARDSTOWN RD.		
15 LOUISVILLE KY 40204		18		
		19 LOUISVILLE KY 40204		
ESC=end text field F3=spell check INS=save/load text				

If you do not enter a comment, just keep hitting enter. If you do enter a comment, you have to hit escape to send the email.

These printing instructions are the same when printing an invoice or a report from Ppro. The only exception is when you are printing an invoice, go to Invoice when the order has been pulled up.

S/O no index		CG Louisville		PD110
Sales Header Entry				
MISTAKE		12 Stage/Dor.	SUMMARY	
S/O no.....04891274		13 Warehouse.....NA	Stat/lins.S	18
B:6305551212 S:PRIMARYPHONE		14 Trip Number...00470267	Product...	541.35
1 Customer....TEST		15 Trms/Tax grp.. 0 KE	Tax.....	32.48
2 Ship to.....		16 Reason code...	Invoice...	573.83
3 Salesperson.CDS		17 Inv/Orig code.I WB		
4 Dlv Dt/Time.01/22/19		18 Discount code.		
5 Pick date...01/21/19 1CS		Total weight..	124.000	
6 Cust Po 1...TEXAS DE BRAZIL		Plt/pkgs..	.04 23.00	
7 Cust Po 2...		Total cube....	19.566	
8 Cash?/Hold?.N N		Ship date.....01/22/19	Margin....	
9 Route/stop..BG28 196		Iv/Pk/Bl/Cf. 1 2 0 0	Margin %..	
10 Shp via/apr.D				
11 A/R invoice.				
BILL TO		SHIP TO		
19 Test User		24 TEST CUSTOMER AND USER		
20		25		
21 1235 JEFFERSON ST.		26 1235 JEFFERSON ST.		
22		27		
23 LOUISVILLE KY 40202 USA		28 LOUISVILLE KY 40202 USA		
Select: [] Add Bol Charges Confsale Entry Find index Invoice Lines Log Lookup				
Last Map Mistakes Palletize Pick QC Quit Search Ship Stamp Trip View Void >				

How to enter a Get Signed Invoice

Occasionally, we have to enter an invoice for an item that was delivered without an invoice. There are a number of reasons for this, including:

- A driver found an item that was shorted off the original invoice and delivered it.
- A driver shopped for an item for a customer and delivered without invoice.
- A driver had extra product on their truck and a customer would like to purchase said items.

Enter a Get Signed invoice just like a regular order, with a couple of exceptions.

Tab through the route.

Add GS in line 16 for the Reason Code.

The screenshot shows a SAP Sales Header Entry screen for a 'Get Signed' invoice. The screen is divided into several sections. At the top, it shows 'S/O no index' and 'CG Louisville PD110'. The main section is titled 'Sales Header Entry' and contains a 'SUMMARY' table with the following data:

Field	Value
12 Stage/Dor.	
13 Warehouse....NA	Stat/lins.0 0
14 Trip Number...	
15 Trms/Tax grp.. 0 KE	
16 Reason code...GS	
17 Inv/Orig code.I	
18 Discount code.	

Below the summary table, there are several fields for customer and shipping information:

- 1 Customer...TEST
- 2 Ship to....
- 3 Salesperson.CDS
- 4 Dlv Dt/Time.03/25/19
- 5 Pick date...03/25/19
- 6 Cust Po 1...
- 7 Cust Po 2...
- 8 Cash?/Hold?.N N
- 9 Route/stop..
- 10 Shp via/apt.D
- 11 A/R invoice.

At the bottom, there are two sections: 'BILL TO' and 'SHIP TO'. The 'BILL TO' section shows 'Test User' and '1235 JEFFERSON ST. LOUISVILLE KY 40202 USA'. The 'SHIP TO' section shows 'TEST CUSTOMER AND USER' and '1235 JEFFERSON ST. LOUISVILLE KY 40202 USA'.

At the very bottom, there is a 'Select:' menu with options: 'Add Airway Bol Charges Confsale Entry Find index Invoice Lines Log Lookup Last Order Pick QC Quit Search Ship Stamp Scans Times Trip View Void >'.

Hit the + key once.

Enter details on the Invoice Instructions. Be as specific as possible so both the customer and accounting know the reason for the Get Signed invoice.

S/O no index	CG Louisville	PD110
Sales Header Entry		
Sales order:05032767 Customer:TEST TEST CUSTOMER AND USER		
1 PICKING INSTRUCTIONS	3 ROUTING INSTRUCTIONS	
2 INVOICE INSTRUCTIONS	4 COMMENTS	
2 Please sign this invoice. Driver had this product on his truck and delivered it on 3/25/19. Thank you		
Select: [] Add Airway Allo Bol Charges Confsale Entry Find index Invoice Lines Log Lookup Last Order Pick QC Quit Search Ship Stamp Times Trip View Void		

Ship the invoice and print 2 copies to the appropriate region's printer.

How to find information about a product

We strive to make sure all our items have a description and a picture. It's easy to find this information in Ppro.

While on any screen, hit F10.

CG Louisville PD250
Inventory by Product Inquiry

1 Product code match.....

Enter partial product code to match

If you know the 5-digit item code, you can enter it here or hit "S" enter to search for an item.

Let's find out information about squid. Upon pressing "s" enter, type "squid".

CG Louisville PMSRCH
Inventory by Product Inquiry

1 Product code match.....s

Product Search

PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Enter search fields

Long description..squid

Packaging.....

At least 3 consecutive non-blank chars

Hit enter twice to be brought to all of the items in Ppro that have the word "squid" in the description. Arrow down to the item you'd like to know more about. In this case, Squid Tubes & Tentacles 4/2.5# CS.

CG Louisville

PMSRCH

Inventory by Product Inquiry

1 Product code match.....5

Product Search

	PROD #	DESCRIPTION	ON HAND	COMMIT	AVAIL	EXPECT
1	71244	BOATDX BYCATCH FLORIDA SQ 5 LB BAG	132.98	0	132.98	0
2	90915	ALFRESCO SQUID INK BUCATINI CA	14	0	14	0
3	48122	SQUID TUBES & TENTACLES WI 10LB CS	0	1	-1	0
4	48505	FZ WHOLE SQUID 6/8 4SQUW 4/11# CS	2	0	2	0
5	48506	SQUID TUBES & TENTACLES 4/2.5# CS	5	0	5	20
6	48507	SQUID TUBES & TENTACLES 3/ 2.5# EA	0	0	0	0
7	48508	SQUID TUBES & TENTACLES 4/2.5# CS	70.5	0	70.5	0
8	48509	SQUID TUBES & TENTACLES 5/ 2.5# EA	0	0	0	0
9	48510	SQUID TUBES 5/8 4/2.5# CS	16	0	16	0
10	48511	FZ SQUID TUBES 5/8 4SQU5E 2.5# EA	0	0	0	0
11	48512	SQUID TUBES 3/5 4/2.5# CS	6	0	6	0
12	48513	FZ SQUID TUBES 3/5 4SQU3E 2.5# EA	0	0	0	0
13	48514	PRECUT SQUID RINGS 25 LB CS	10.3	0	10.3	0
14	48515	PRECUT SQUID RINGS 2.5# EA	0	0	0	0
15	48516	SQUID RINGS AND TENTICLES 25 LB CS	21.2	0	21.2	0
	48508	4SQU5				

PRICE : 58.8917 - COMP FILE FORMULA

Market : 41.224

Select: Chg_layout Colors Config Days Exceptions Info Lead List Lot Quit

Search Select Show Specord View

Hit enter to be brought to this screen.

Product Inventory by Warehouse						PML			
DESCRIPTION				WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001									
1	SQUID TUBES & TENTACLES 5/8 4/2.5# CS			BR	0	0	0	0	
2				BT	0	0	0	0	
3				CG	70.5	0	70.5	0	
4				CH	0	0	0	0	
5				CI	0	0	0	0	
6				CS	0	0	0	0	
7				IN	0	0	0	0	
8				LE	0	0	0	0	
9				NA	0	0	0	0	
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
WHSE/PROD#/PROD:CG/48508/4SQU5					71	0	71	0	
PRICE ; 58.8917 - COMP FILE FORMULA					Market : 41.224				
					FUTURE : 41.225				
Select: <u> </u> Allcomp Altunit Attachments Days Department Distribute Find index									
Location Movement Pallets Product Project Quit Select Show Transact Warehouse									

Here, you can see the warehouse this product is stored.

Quick warehouse code glossary:

BR – Brokerage

BT – Bardstown

CG – Louisville

CI – Cincinnati

CS – Columbus

IN – Indianapolis

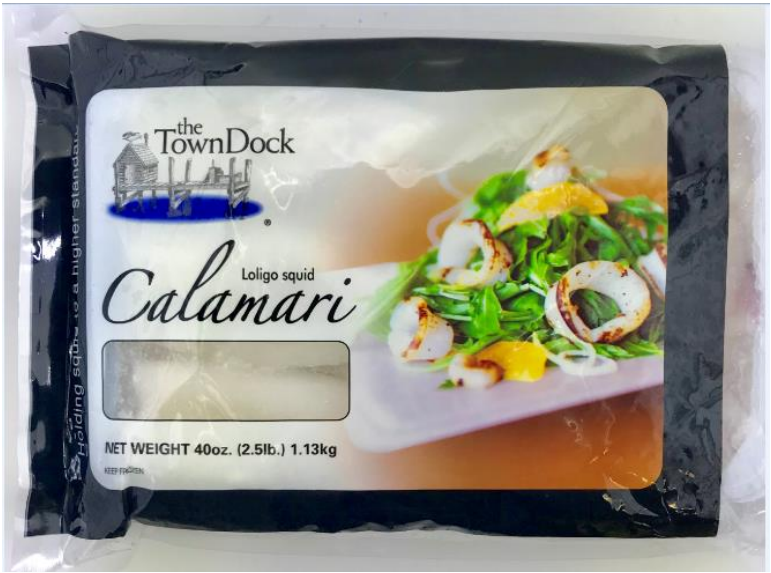
LE – Lexington

NA – Nashville

To see a picture of this product, hit “a” for Attachments.

Product Inventory by Warehouse										PML
DESCRIPTION					WHSE	O/H	COMMIT	AVAIL	EXPECT	
Company->0001										
1	SQUID TUBES & TENTACLES 5/8		4/2.5#	CS	BR	0	0	0	0	
2					BT	0	0	0	0	
3					CG	70.5	0	70.5	0	
4					CH	0	0	0	0	
5					CI	0	0	0	0	
6					CS	0	0	0	0	
7					IN	0	0	0	0	
8					LE	0	0	0	0	
9					NA	0	0	0	0	
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
WHSE/PROD#/PROD:CG/48508/4SQUTT5						71	0	71	0	
PRICE : 58.8917 - COMP FILE FORMULA						Market : 41.224				
						FUTURE : 41.225				
Select: <input type="checkbox"/> Allcomp <input type="checkbox"/> Altunit <input type="checkbox"/> Attachments <input type="checkbox"/> Days <input type="checkbox"/> Department <input type="checkbox"/> Distribute <input type="checkbox"/> Find index										
Location Movement Pallets Product Project Quit Select Show Transact Warehouse										

This is the picture of the product.



To find information on this product, hit “.” Then “I” for Info.

Product Inventory by Warehouse							PML
DESCRIPTION	WHSE	O/H	COMMIT	AVAIL	EXPECT		
Company->0001							
1 SQUID TUBES & TENTACLES 5/8	4/2.5# CS	BR	0	0	0	0	
2		BT	0	0	0	0	
3		CG	70.5	0	70.5	0	
4		CH	0	0	0	0	
5		CI	0	0	0	0	
6		CS	0	0	0	0	
7		IN	0	0	0	0	
8		LE	0	0	0	0	
9		NA	0	0	0	0	
10							
11							
12							
13							
14							
15							
16							
17							
18							

Select: ___ Allcomp Altunit Attachments Brand Buyer Chg_layout Colors
 Commodity Company Config Customer Days Department Distribute
 Exceptions Find index Info Infomaint Input_prod Layout Lead
 List Location Log Movement Notes Pallets Prodcats Prodsel
 Product Project Purchase Quit Rcv_range Select Show Specord
 Subs Transact Upload Vendor Warehouse

A pdf will open with the picture and description of the product. This is the same info a customer will see when they are online or on the app.



Product: 48508

Description: SQUID TUBES & TENTACLES 5/8

Packaging: 4/2.5# CS

Product Description

Our Traditionally Cleaned Calamari is imported calamari with a high quality reputation. Its delicate and smooth texture makes it a top choice among chefs. Available in a variety of sizes, it is ideal for any dish!

- Traditionally Cleaned - Wings On
- Imported Loligo squid
- Excellent reputation among top chefs
- Superb consistency

Descriptions and pictures are maintained by our Digital Content Creator, Joey Mudd, with the help of the purchasing team. If you see incorrect information, please send a Zendesk ticket to Joey Mudd as part of the Marketing team and he will update.

If you need to find out if the product is stored frozen or fresh, follow these steps.

While a warehouse with inventory is highlighted, hit “L” for Location.

Product Inventory by Warehouse										PML
DESCRIPTION				WHSE	O/H	COMMIT	AVAIL	EXPECT		
Company->0001										
1	SQUID TUBES & TENTACLES 5/8			4/2.5# CS	BR	0	0	0	0	
2					BT	0	0	0	0	
3					CG	70.5	0	70.5	0	
4					CH	0	0	0	0	
5					CI	0	0	0	0	
6					CS	0	0	0	0	
7					IN	0	0	0	0	
8					LE	0	0	0	0	
9					NA	0	0	0	0	
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
WHSE/PROD#/PROD:CG/48508/4SQUTT5					71	0	71	0		
PRICE : 58.8917 - COMP FILE FORMULA					Market		: 41.224			
					FUTURE		: 41.225			
Select: Allcomp Altunit Attachments Days Department Distribute Find index										
Location Movement Pallets Product Project Quit Select Show Transact Warehouse										

Look at the default pick location on line 1.

Product Inventory by Warehouse										PD341
DESCRIPTION										
Company->0001										
		WHSE	O/H	COMMIT	AVAIL	EXPECT				
1	SQUID TUBES & TENTACLES 5/8	4/2.5# CS BR	0	0	0	0				
2		BT	0	0	0	0				

48508 - 4SQUTT5

Warehouse.....CG CG Louisville

1 Default pick location.....F A04 19 F A04 19
2 Default pick location after depletion?..N
3 Miscellaneous secondary location.....
4 Miscellaneous sort value..... 0

5 Default vendor / Ship from vendor.....
6 Default buyer.....
7 Default origin.....

8 Special order item code.....
9 Purchasing lead time code.....
10 Default repack cost code.....

11 Override inventory warehouse.....

Select: Add Adnl_locn Config Delete Find Labels Modify Page Quit Showall Stamp View

If the pick location starts with an “F”, that item is housed in the freezer. If the pick location starts with a “W”, the item is housed in the dry warehouse (meaning it is shelf stable). All other pick locations are refrigerated areas.

What if you need more information about this product? The purchasers are your first choice for finding out more information. Let’s find who the purchaser of a product is.

Follow this path. 10 – Master Files → 1 – Product files → 1 – Products

Or hit the speed key, .34

Produce Pro		0001	CG Louisville	MFMENU PM
Produce master files				
Produce	1 Control file	Produce product files		
1 Purchasing,	2 Customer file	1 Products		
2 A/P interfa	3 Vendor file			
3 Sales	4 Product file	2 Product grouping files		
4 Shipping	5 Purchasing	3 Product cross-reference files		
5 Routing	6 Inventory f	4 Product brand files		
6 A/R interfa	7 Pricing fil			
7 Inventory	8 Accounting	5 Units of measure		
8 Pricing	9 Sales files	6 Special order item codes		
9 Document ex	10 Shipping fi	7 Product exclusion reason codes		
10 Master file	11 Delivery fi	8 Product packaging types		
11 Sales analy	12 Quality Con	9 Manufacturer codes		
12 Brokerage e	13 Grower file	10 Lead time codes		
13 Grower oper	14 Food safety	11 Allergen types		
14 Work orders	15 Customer do			
15 Utilities	16 Administrat	12 Product master update utility		
16 Food safety	17 Work order	13 Generate Product Info Documents		
17 Change ware	18 Reports men			

If you know the item code, hit “f” for Find and type in the 5-digit item code.

Or hit “s” for Search and then search for the item. Let’s look at that squid we were looking at earlier. It is item 48508.

Product index		CG Louisville	P0340
		Product Master	
Product.....	48508		
1 Prod number / short desc..			
2 Description/packaging....			
3 Customer override desc....			
4 Long description.....			
CLASSIFICATION			
5 Commodity.....			
6 Class.....			
7 Department.....			
8 Buyer.....			
9 Default purchase unit.....			
10 Default sales/market cost unit....			
11 Retail unit/alt report unit.....			
12 Product/pound type/entry/var wght.			
13 Broken inventory?/pricing?.....			
14 Repack item?/auto-split?.....			
15 Auto-split at receiving?.....			
16 Active/future active?/reason.....			
INVENTORY			
			On-hand quantity.....
			Committed quantity....
			Available quantity....
			Expected quantity.....
(S)earch			

```

Product index          CG Louisville          PD340
                        Product Master
Product.....4SQUTT5
1 Prod number / short desc..48508
2 Description/packaging....SQUID TUBES & TENTACLES 5/8      4/2.5# CS
3 Customer override desc...SQUID - TUBES & TENT 5/8 IMP    4/2.5 LB C
4 Long description.....FZ SQUID TUBES & TENTACLES 5/8 4SQUTT5

CLASSIFICATION
5 Commodity.....SEAF000
6 Class.....SS
7 Department.....SS
8 Buyer.....KB
9 Default purchase unit.....
10 Default sales/market cost unit....
11 Retail unit/alt report unit.....
12 Product/pound type/entry/var wght.P N Available quantity.... 70.50
13 Broken inventory?/pricing?.....N N Expected quantity.... .00
14 Repack item?/auto-split?.....N N
15 Auto-split at receiving?.....
16 Active/future active?/reason.....Y Y

Select: [ ] Add Attachments Exceptions Find Formulas index Keywords List Log
Lot Modify Quit Search Stamp Substitute Units View Warehouse Webmesg >

```

This screen has lots of information, most of which is used by the purchasers. Line 8 has the Buyer. For this product, the Buyer is KB. You will get to know the employee codes of the purchasers well. KB is Ken Berry. If you'd like to find out that information, ask your neighbor; it is likely they know. In the event no one is available, go to line 8 and then hit "s" enter to search.

```

Product index          CG Louisville          PD340
                        Product Master
Pro-Buyer/Salesperson-
1 Pro INTL NAME CREW
2 Des 0CW Corey Williams PU ES 5/8 4/2.5# CS
3 Cus ABD Adam Dever 5/8 IMP 4/2.5 LB C
4 Lon AHD Alex Deskins ACLES 5/8 4SQUTT5
CLASS AJC Joe Campbell
5 Com AJT John Thomas
6 Cla AL Adam Lasita
7 Cla AMS Aaron Shular
7 Dep AN Audrey Nelson
8 Buy ANS Tony Speratos
9 Def APS April Smiley
10 Def AV Abby Voss
11 Ret AW Aaron Wannamuehler
12 Pro BB Beth Boyer
13 Bro SEARCH: (F3) Active only
14 Repack item?/auto-split?.....N N
15 Auto-split at receiving?.....
16 Active/future active?/reason.....Y Y

```

You will see a list of all employee codes. Be careful, though, you don't want to accidentally change the purchaser; hit escape after viewing these employee codes.

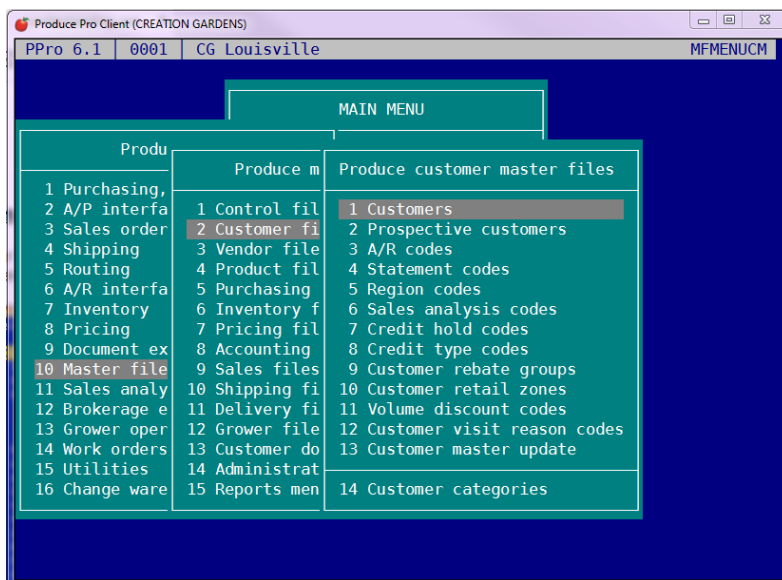
Customer Master Files

Customer Master File is the place where we begin the setup process in Produce Pro (PPro for short) for all new and existing accounts. It serves as the primary information page that controls many day to day functions. The accounting department will set up all new accounts but it is the responsibility of the Managing Partners and Customer Advocates to maintain these master files and make sure information is current.

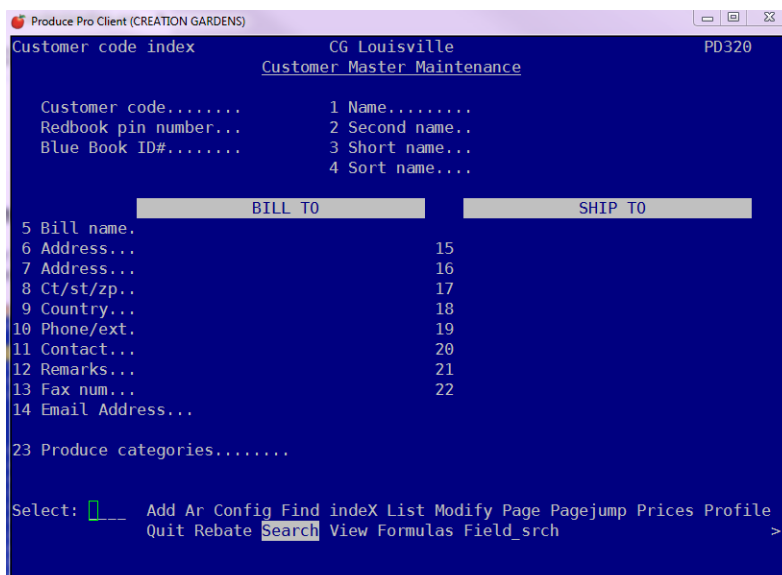
In order to access these files follow these steps:

1 – Produce Pro → 10 – Master Files → 2 – Customer Files → 1 – Customers

You can also access this by hitting .32 while on any menu.



This will take you to the Customer Master Maintenance screen.



Hit "S" for Search, which takes you to this screen:

Produce Pro Client (CREATION GARDENS)

Customer code index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

Enter search fields

Name..test

At least 3 consecutive non-blank chars

ALL RECORDS

Then input the account you are looking for. For this example we will use the TEST account. You must enter at least 3 consecutive characters when searching for anything (customer, product, etc.) in PPro. Next arrow to the customer you are looking for and hit enter.

Produce Pro Client (CREATION GARDENS)

Customer code index CG Louisville CMSRCH

Customer Search

CUST	CUSTOMER NAME	ADDRESS	CITY	ST
1	TEST 1test (1234567890)	1235 JEFFERSON ST.	Louisville	KY
2	3PROTE EVANSVILLE PROTESTANT HOME INC	3701 WASHINGTON AV	EVANSVILLE	IN
3	000005 Retail Test Customer	Creation Gardens W	Louisville	KY
4	000006 +Ralph Test2	4301 Campisano Dri	Louisville	KY
5	000007 PPRO TESTING CUSTOMER	testing address	testing city	IL
6	000202 Ralph - TEST RETAIL	Creation Gardens W	Louisville	KY
7	000625 Brown Forman Test	Creation Gardens W	Louisville	KY
8	000627 BF Retail Test Customer	Creation Gardens W	Louisville	KY
9	001085 RALPHTEST372014	Creation Gardens W	Louisville	KY
10	001535 MOLLITEST372014	Creation Gardens W	Louisville	KY
11	IPAD IPAD TEST CUSTOMER	1234 JEFFERSON ST.	Louisville	KY
12	4LOG16 LOGANS TEST KITCHEN	2981 SIDCO DR	NASHVILLE	TN
13	TESTEC test ecom (1234567890)	1234 JEFFERSON ST.	Louisville	KY
14	2SPEAD Test Customer Lexington	Hayden's		
15	1TESTK TEST KITCHEN	2055 NELSON MILLER	LOUISVILLE	KY
16	TEST3 RACHEL TEST 1			
17	TEST4 RACHEL TEST 2			
18	TEST6 DENNY TEST 1			

ALL RECORDS

CDS CONTACT:CHEF NAME AND CALL TIME ZIP CODE:40202

PHONE:PRIMARY PHONE FX: STORE ID:

Select: Chg_layout Colors Config Contact Prospect Quit Search Select

Showall View

Which will take you to the Customer Master Maintenance screen. Like this.

Produce Pro Client (CREATION GARDENS)

Customer code index CG Louisville PD320

Customer Master Maintenance

NOTE

Customer code.....TEST 1 Name.....1test (1234567890)
 Redbook pin number... 2 Second name..
 Blue Book ID#..... 3 Short name...
 4 Sort name....1TEST (12345

BILL TO	SHIP TO
5 Bill name..Test User	1test (1234567890)
6 Address...1235 JEFFERSON ST.	15
7 Address...	16
8 Ct/st/zp..Louisville KY 40202	17
9 Country...USA	18
10 Phone/ext.6305551212	19 PRIMARY PHONE
11 Contact...	20 CHEF NAME AND CALL TIME
12 Remarks...DELETE ANY TEXT HERE	21 BACKUP PHONE NUMBER
13 Fax num...	22
14 Email Address...	

23 Produce categories.....L0 E0 PL PY VN CN LE

Select: ☐ Add Ar Banking Contacts Find index List Log Modify Notes Pagejump
 Phone Prices Profile Quit Route Search Stamp View Warehouses Field_srch >

This screen is the primary source for contact information for an account.

Line 11 Contact – please enter the best contact person (Please also enter this person as a contact. Tutorial follows)

Line 12 Remarks – this could be anything. For example “Call after 10:00 AM” or “Always call Jeff first”, etc.

Line 13 – Fax – self explanatory

Line 14 – email address – self explanatory

Line 23 – Produce categories – we will get into those in another training lesson

Customer Contacts

On the Customer Master Maintenance home screen, choose Contacts from the bottom menu by either using your arrows or hitting "C".

```
Select: █ ____ Add Ar Banking Contacts Find index List Log Modify Notes Pagejump
Phone Prices Profile Quit Route Search Stamp View Warehouses Field_srch >
```

Now you will see a list of all contacts that have been added to the account. If this is a brand new account, you may only see ONLINE LOGIN as one of the contacts. In order to add a new contact, follow these steps. Select any contact.

TYPES	NAME	EMAIL	PHONE	T	PRF	IA
OL	ONLINE LOGIN					N
PR	Prospective Cust	ralphb@creatio		E	N	
AL	Ralph		5028279201	F	N	
AL	Rob		5027974105	F	N	
AL	Ron		5026644707	F	N	
AL	Lori	lorid@creation		E	N	
AL	Ralph	ralphb@creatio		E	N	
OL	KPK TEST					N
OL	Phil (PPRO)					N
IV	DXT	dxt@producepro		E	N	
OL	Trevor Test	tcc@producepro				N
OL	ADO_PPRO TEST	ado@producepro		E	N	

ACTIVE ONLY

Each contact is assigned one or more two letter codes, called the **Contact Type**, line 1. Every customer will have specific people within their business who may need unique information. For example, the Executive Chef may receive Order Confirmations, Invoices and Marketing Materials but the Accountant only needs Statements. This is where you can input and differentiate these contacts.

First, we'll add a new contact. Once you have selected one of the current contacts, type "A" for ADD then Enter.

Customer code index CG Louisville CNFMNT2
Customer Master Maintenance

NOTE
Customer code.....TEST 1 Name.....TEST CUSTOMER AND USER
Redbook pin number... 2 Second name..
Blue Book ID#..... 3 Short name...

Contacts
Sequence.... 15

PHONE LIST	
11 C 123-456-7890	N
12 C 098-765-4321	Y
13 F 222-333-4444	
14	
15	
16 Doc print pref....	
17 Attachment format..	
18 Email type.....	
19 Contact pref 1/2/3.E	
20 Inactive.....N	

1 Types.....OL
2 Name.....KPK TEST
3 Addr 1.....
4 Addr 2.....
5 Ci/St/Zp....
6 Country.....
7 Email.....
8 Company.....
9 Title.....
10 Comment....

Source...CM TEST 17171

Select: ☐ Add Config Delete Find Modify Next Page Prev Quit Resume Search
Showall Stamp View Webgroups

Here's an explanation of what the different contact types are.

CC – Chief Contact Zendesk – When a contact also has the type, CF, Zendesk will consider this contact first if a duplicate number or email is detected in Zendesk.

CF – Ordering & Business Contact – When a contact has this type included, the information (name, phone number(s) and email address) will be imported into Zendesk.

ED – EDI Contact – A contact who would be the best person to speak to about any EDI issues.

IV – Invoice Contact – a contact tagged IV will receive an emailed copy of their invoice once it has been signed on the driver phone app

MK – Marketing – a contact tagged MK will receive email marketing (for instance: market reports, vendor and product spotlights, holiday delivery schedules, etc.)

OC – Web Order Confirmation – This contact will receive an email once a web order has been placed. This contact will also receive an email notification if an item has been shorted from their order.

OL – Online Login – This contact is enabled with a login and password to order via the web or app. If a customer wants to be able to order online, then they must have this contact type. If you have an email address on the OL, then PPro will send a notification for things like missing cut off or didn't complete the check out process.

PR – Pricing and Order Guide - Adding PL on line 23 of the Customer Master Maintenance home screen makes sure price lists are emailed automatically. You have to also have the contact type PR on the contact you want the price list to go to.

ST – A/R (Accounts Receivable) Statements – This contact will receive statements. Please get with the accounting department to get these set up correctly.

Contact type VS is not used with customers.

Now back to creating a new contact. For this exercise, let's input an Executive Chef. Joe Chef will be receiving invoices and marketing materials and is the contact for Zendesk. When you are in "Types", you can hit "S" enter to search for your options. Once you have finished entering the types, hit enter and you will be taken to the next field.

The screenshot shows the 'Customer Master Maintenance' screen for 'CG Louisville'. A 'Contact Type Inquiry' dialog box is open, displaying a list of contact types. The 'Type Description' column lists various roles, with 'CC CHIEF CONTACT ZENDESK' selected at the top. The background screen shows fields for 'Customer code' (TEST), 'Redbook pin number', 'Blue Book ID#', and a 'Contacts' section with 'Sequence' 33. The 'Types' field is currently set to 'S'.

Type	Description
1 CC	CHIEF CONTACT ZENDESK
2 CF	Ordering & Business Contact
3 ED	EDI CONTACT
4 IV	Invoice Contact
5 MK	Marketing Material
6 OC	Web Order Confirmation
7 OL	Online Login
8 PR	Pricing and Order Guide
9 ST	A/R Statements
10 VS	Vendor Sales Rep

Enter in the appropriate fields. Title, email and phone numbers are very important for WOW Center contact.

A word about entering phone numbers:

Up to 5 phone numbers can be inputted for each contact. These are housed in lines 12 – 15. Enter the type of phone (H) Home, (W) Work, (C) Cell, (F)Fax in the first box.

The screenshot shows the 'Customer Master Maintenance' screen for 'CG Louisville'. The 'PHONE LIST' section is visible, showing a list of phone numbers. The 'Type' column lists various phone types, with 'C' (Cell) selected for the first two entries. The background screen shows fields for 'Customer code' (TEST), 'Redbook pin number', 'Blue Book ID#', and a 'Contacts' section with 'Sequence' 33. The 'Types' field is currently set to 'CF'.

Type	Phone Number
11 C	502-555-1234
12 W	502-555-5678
13	
14	
15	

Add the phone number, area code included, without a 1 in front of the area code. You can add dashes, but they are not necessary. For example, (502)555-5555 can be entered 5025555555. Just be sure not to put a 1 in front of the number. The next box has a spot for an extension, if needed. The last box has a box for whether the phone is a text enabled cell phone. Please place a Y or N in that box.

On line 19, please indicate the customer's preferred phone number for contact. For this example, the customer prefers to be texted first and then the work number called. I have entered T1 (1 referring to the first phone number in the contact) and C2 (to indicate to call the second number).

Customer code index		CG Louisville		CNFMNT2
Customer Master Maintenance				
NOTE				
Customer code.....TEST	1 Name.....TEST	CUSTOMER AND USER		
Redbook pin number...	2 Second name..			
Blue Book ID#.....	3 Short name...			
Contacts				
Sequence.... 33	PHONE LIST			
1 Types.....CF	11 C 502-555-1234	Y		
2 Name.....Testing	12 W 502-555-5678			
3 Addr 1.....	13			
4 Addr 2.....	14			
5 Ci/St/Zp....	15			
6 Country.....	16 Doc print pref....E			
7 Email.....test@testing.com	17 Attachment format..PDF			
8 Company.....	18 Email type.....H			
9 Title.....Exec. Chef	19 Contact pref 1/2/3.T1 C2			
10 Comment....	20 Inactive.....N			
	Source...			
()				
()none (C)all # (T)ext # (E)mail # = (1-5)				

Enter through until you get to the screen with the web login id and web password. If this contact will be using the web/app to place orders, please create a login for them using their email address and create a password. The password can be changed by the customer once they log in.

Customer code index	CG Louisville	CNFMNT2
Customer Master Maintenance		
NOTE		
Customer code.....TEST	1 Name.....TEST	CUSTOMER AND USER
Redbook pin number...	2 Second name..	
Blue Book ID#.....	3 Short name...	
Contacts		
Name.....Testing		
1 Web login id.....TEST@TESTING.COM		
2 Web password.....apple21		
3 Force password change? / Last change...N		
E-COMMERCE		
4 Last survey date.....		
5 Allow contact maintenance?.....		
6 Contacts can view other contacts?.....		
7 Contacts can edit other contacts?.....		
8 Contacts can add other contacts?.....		
9 Hide from other contacts?.....		
Min length=4		

How to find online login and password

Every customer has a unique online login and password. Login and password are the same for both the app and the website. Here's where a customer's login and password is stored in PPro.

On the Customer Master Maintenance screen, hit "C" for Contacts then enter.

```
Select: [ ]___ Add Ar Banking Contacts Find index List Log Modify Notes Pagejump
Phone Prices Profile Quit Route Search Stamp View Warehouses Field_srch >
```

Then select the contact that has the type OL. For some customers, there may be more than one.

TYPES	NAME	EMAIL	PHONE	T	PRF	IA
OL	ONLINE LOGIN		123456789012345	H		N
	Prospective Cust	ralphb@creatio			E	N
AL	Ralph		5028279201	W	F	N
AL	Rob		5027974105	W	F	N
AL	Ron		5026644707	W	F	N
AL	Lori	lorid@creation			E	N
AL	Ralph	ralphb@creatio			E	N
OL	KPK TEST		123-456-7890	C		N
OL	Phil(PPRO)					N
IV	DXT	dxt@producepro			E	N
AL IC VS OC OL	TCC_PPRO	tcc@producepro	502-555-5555	C		N
OL	ADO_PPRO TEST	ado@producepro			E	N
IV	Joe Chef	joechef@testre	502-555-5555	C	E	N
OL	Chris Test	crb@producepro				N
OL	Chris test					N

-----ACTIVE ONLY-----

Select: []___ Config Find Quit Search **Select** Showall

Hit the "+" key 1 time and you will see this screen:

```
Customer code index      CG Louisville      CNFMNT2
                        Customer Master Maintenance

*NOTE*
Customer code.....TEST      1 Name.....TEST CUSTOMER AND USER
Redbook pin number...      2 Second name..
Blue Book ID#.....      3 Short name...

Contacts
Name.....ONLINE LOGIN

1 Web login id.....TEST
2 Web password.....****
3 Force password change? / Last change...N 10/22/18

E-COMMERCE
4 Last survey date.....

5 Allow contact maintenance?.....Y
6 Contacts can view other contacts?.....Y
7 Contacts can edit other contacts?.....Y
8 Contacts can add other contacts?.....
9 Hide from other contacts?.....

Select: [ ]___ Add Config Delete Find Modify Next Page Prev Quit Resume Search
Showall Stamp View Webgroups
```

Login ID is on line 1. In order to reveal the Password, type "2" then enter and the password is revealed.

Contacts

Name.....ONLINE LOGIN

1 Web login id.....TEST

2 Web password.....TEST

3 Force password change? / Last change....N 10/22/18

E-COMMERCE

4 Last survey date.....

5 Allow contact maintenance?.....Y

6 Contacts can view other contacts?.....Y

7 Contacts can edit other contacts?.....Y

8 Contacts can add other contacts?.....

9 Hide from other contacts?.....

