# Understanding 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.
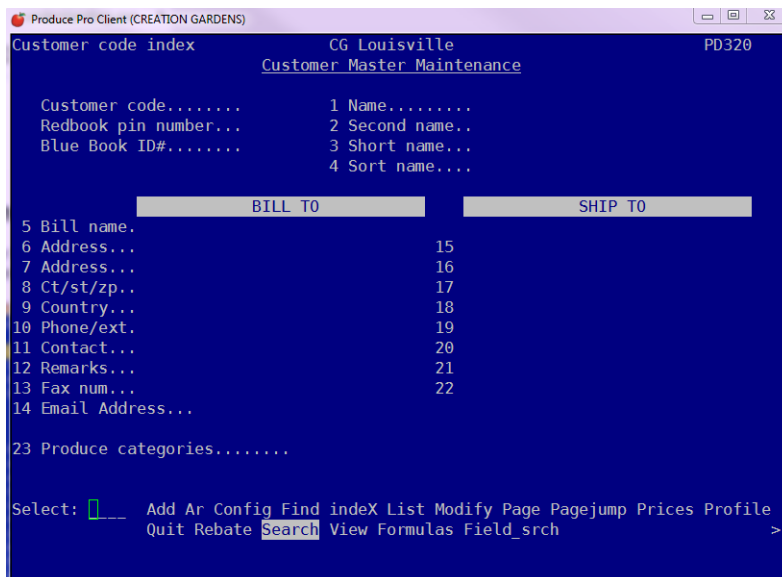
In order to access these files follow these steps:

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

You can also access this by hitting .32 while on any menu.
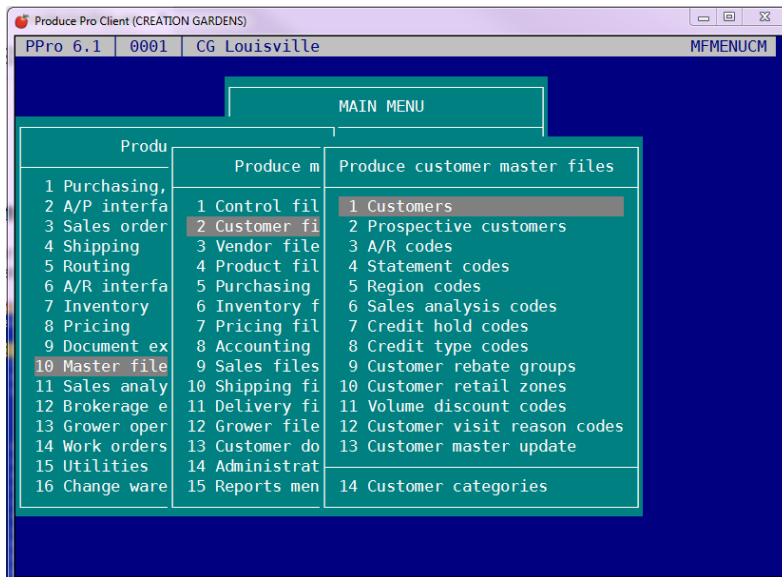
This will take you to the Customer Master Maintenance screen.

Hit "S" for Search, which takes you to this screen:
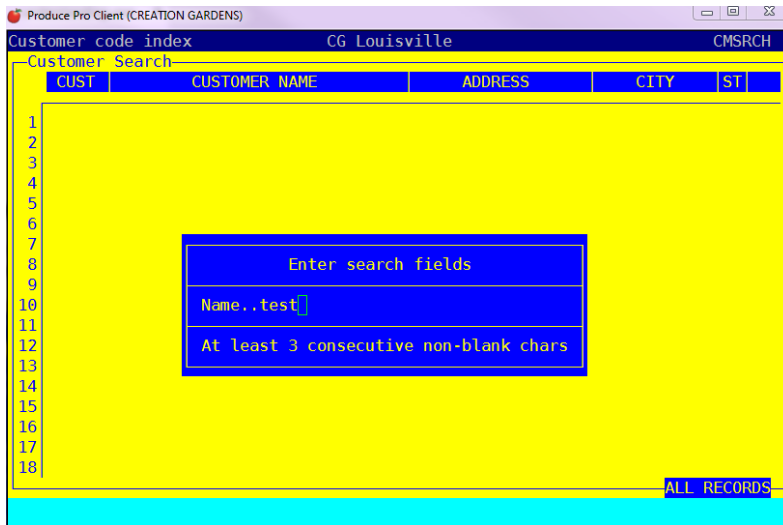
Then input the account you are looking for. For this example we will use the TEST account. You must enter at least 3 consecutive characters when searching for anything (customer, product, etc.) in PPro. Next arrow to the customer you are looking for and hit enter.
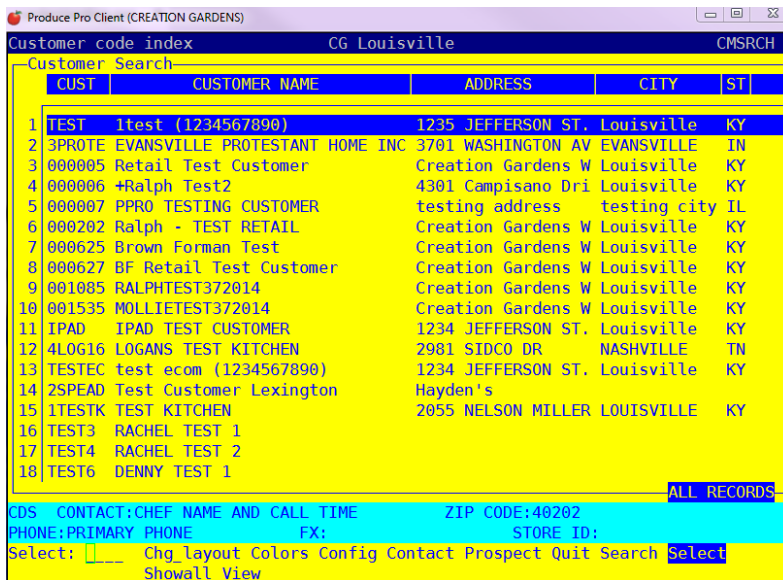
Which will take you to the Customer Master Maintenance screen. Like this.

```
Customer code index              CG Louisville                    PD320
                           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...
                                 4 Sort name....TEST CUSTOME

              BILL TO                            SHIP TO
 5 Bill name.Test User            TEST CUSTOMER AND USER
 6 Address...1235 JEFFERSON ST.   16
 7 Address...                     17
 8 Ct/st/zp..LOUISVILLE    KY  40202  18
 9 County....                     19
10 Country...USA                  20
11 Phone/ext.6305551212           21 PRIMARY PHONE
12 Contact...                     22 CHEF NAME AND CALL TIME
13 Remarks...DELETE ANY TEXT HERE 23 BACKUP PHONE NUMBER
14 Fax num...                     24
15 Email Address...

25 Produce categories........LO EO PL VN LE BF TT

Select: []__   Add Ar Contacts Find indeX Instructions List Log Lookup Modify
Notes Pagejump Phone Prices Profile Quit Route Search Stamp View Warehouses   >
```

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

Line 12 Contact – please enter the best contact person (VERY IMPORTANT - Please also enter this person as a contact. Tutorial follows)

Line 13 Remarks – this could be anything. For example "Call after 10:00 AM" or "Always call Jeff first", etc.

Line 14 – Fax – self explanatory

Line 15 – email address – self explanatory

Line 25 – Produce categories – we will get into those in another training lesson

Understanding Customer Contact Files

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

```
Select: █___    Add Ar Contacts Find indeX Instructions List Log Lookup Modify
Notes Pagejump Phone Prices Profile Quit Route Search Stamp View Warehouses    >
```

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
   1 Types.......OL               12 C 098-765-4321          Y
   2 Name........KPK TEST         13 F 222-333-4444
   3 Addr 1......                 14
   4 Addr 2......                 15
   5 Ci/St/Zp....
   6 Country.....                 16 Doc print pref.....
   7 Email.......                 17 Attachment format..
                                  18 Email type.........
   8 Company.....                 19 Contact pref 1/2/3.E
   9 Title.......                 20 Inactive..........N

  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.

```
Customer code index          CG Louisville                   CNYINQ
                       Customer Master Maintenance
*NOTE*
    Customer code.......TEST    1 Name........TEST CUSTOMER AND USER
    Redbook pin number...       2 Second name..
    Blue Book ID#........       3┌Contact Type Inquiry─────────
┌Contacts───────────────────────│   Type Description
    Sequence.... 33             │
                                │  1  CC  CHIEF CONTACT ZENDESK
 1 Types.......S                │  2  CF  Ordering & Business Contact
 2 Name........                 │  3  ED  EDI CONTACT
 3 Addr 1......                 │  4  IV  Invoice Contact
 4 Addr 2......                 │  5  MK  Marketing Material
 5 Ci/St/Zp....                 │  6  OC  Web Order Confirmation
 6 Country.....                 │  7  OL  Online Login
 7 Email.......                 │  8  PR  Pricing and Order Guide
                                │  9  ST  A/R Statements
 8 Company.....                 │ 10  VS  Vendor Sales Rep
 9 Title.......                 │ 11
                                │ 12
10 Comment.....                 │ 13
                                │ 14
                                └──────────────ACTIVE ONLY──────

Select: [    ]   Config  Find  Quit  Select  Showall
```
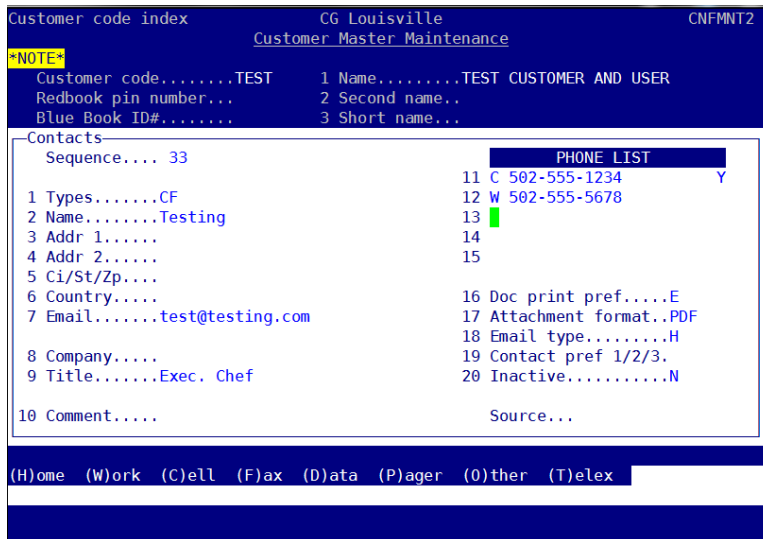
Enter in the appropriate fields. Title, email and phone numbers are very important for WOW Center contact.

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.

```
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 ──────┐
                                11 C 502-555-1234            Y
 1 Types.......CF               12 W 502-555-5678
 2 Name........Testing          13
 3 Addr 1......                 14
 4 Addr 2......                 15
 5 Ci/St/Zp....
 6 Country.....                 16 Doc print pref.....E
 7 Email.......test@testing.com 17 Attachment format..PDF
                                18 Email type.........H
 8 Company.....                 19 Contact pref 1/2/3.
 9 Title.......Exec. Chef       20 Inactive..........N

10 Comment.....                    Source...


(H)ome  (W)ork  (C)ell  (F)ax  (D)ata  (P)ager  (O)ther  (T)elex
```

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
                                 11 C 502-555-1234            Y
  1 Types.......CF               12 W 502-555-5678
  2 Name........Testing          13
  3 Addr 1......                 14
  4 Addr 2......                 15
  5 Ci/St/Zp....
  6 Country.....                 16 Doc print pref.....E
  7 Email.......test@testing.com 17 Attachment format..PDF
                                 18 Email type.........H
  8 Company.....                 19 Contact pref 1/2/3.T1 C2
  9 Title.......Exec. Chef       20 Inactive...........N

 10 Comment.....                    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
```

Understanding Produce Categories

Produce Categories help us organize our data in Produce Pro, are used when running reports, are used pricing and other functions in Ppro.

To see and edit the Produce Categories of a customer, pull up the customer's Customer Master. Line 25 shows the Produce Categories assigned to a customer.

```
Customer code index          CG Louisville              PD320
                    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...
                                 4 Sort name....TEST CUSTOME

                   BILL TO                         SHIP TO
 5 Bill name.Test User                  TEST CUSTOMER AND USER
 6 Address...1235 JEFFERSON ST.       16
 7 Address...                         17
 8 Ct/st/zp..LOUISVILLE      KY  40202 18
 9 County....                         19
10 Country...USA                      20
11 Phone/ext.6305551212               21 PRIMARY PHONE
12 Contact...                         22 CHEF NAME AND CALL TIME
13 Remarks...DELETE ANY TEXT HERE     23 BACKUP PHONE NUMBER
14 Fax num...                         24
15 Email Address...

25 Produce categories........LO EO PL VN LE BF TT IN  ←

Select: ___   Add Ar Contacts Find indeX Instructions List Log Lookup Modify
Notes Pagejump Phone Prices Profile Quit Route Search Stamp View Warehouses     >
```

As you learn more about our company, some of these categories will look familiar. If you'd like to find out what these 2 digit codes mean, you can enter 25 to go to line 25, then use the arrow keys to go to an open spot.

```
Customer code index          CG Louisville              PD320
                    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...
                                 4 Sort name....TEST CUSTOME

                   BILL TO                         SHIP TO
 5 Bill name.Test User                  TEST CUSTOMER AND USER
 6 Address...1235 JEFFERSON ST.       16
 7 Address...                         17
 8 Ct/st/zp..LOUISVILLE      KY  40202 18
 9 County....                         19
10 Country...USA                      20
11 Phone/ext.6305551212               21 PRIMARY PHONE
12 Contact...                         22 CHEF NAME AND CALL TIME
13 Remarks...DELETE ANY TEXT HERE     23 BACKUP PHONE NUMBER
14 Fax num...                         24
15 Email Address...

25 Produce categories........LO EO PL VN LE BF TT IN
(S)earch
```

While in the open space, hit S enter to search for Produce Categories.
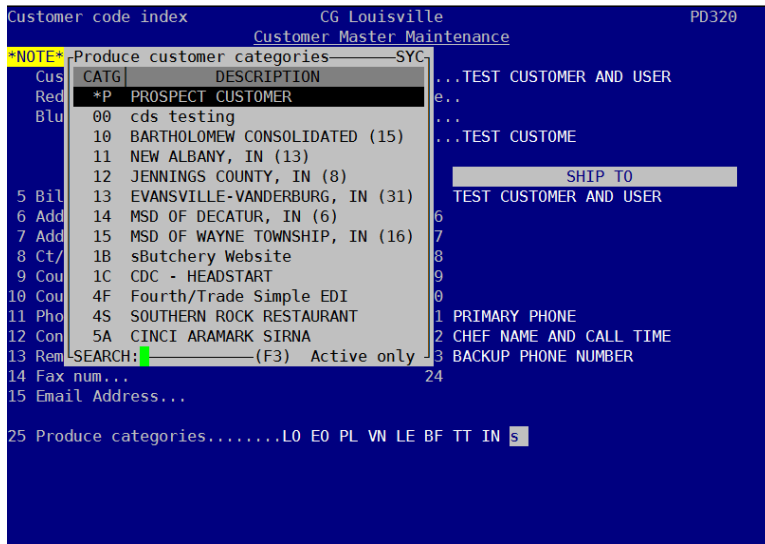
You can use the arrows to scroll through the list or use the Page Up or Page Down keys. You can also start typing the produce category to jump right to it. In this instance, let's find what the category LO refers to.
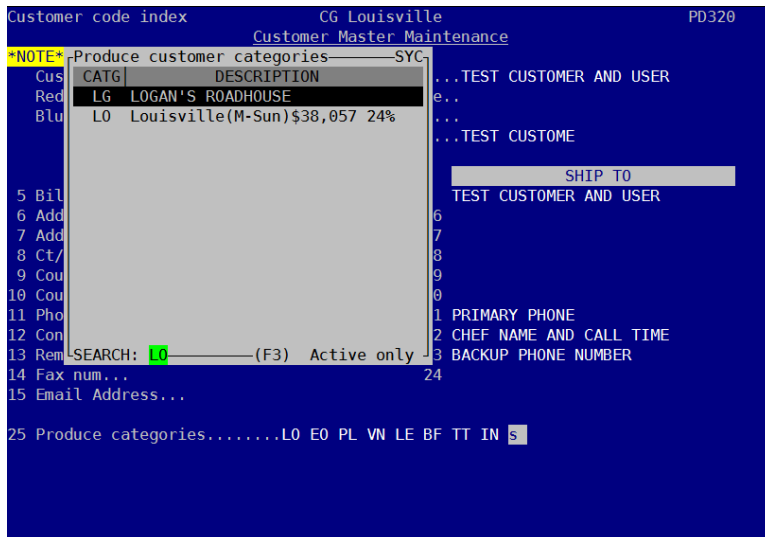
I inputted LO and see that category is Louisville.

There are categories assigned to each Customer Advocate, some chain restaurants, regions, etc.

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  Contacts  Find indeX Instructions List Log Lookup Modify
Notes Pagejump Phone Prices Profile Quit Route Search Stamp View Warehouses      >
```

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?..............          │
│                                                    │
└────────────────────────────────────────────────────┘
```

How to Build a Profile in Entry mode

There are 2 ways to build a customer's profile, ENTRY or BUILD. Let's work with ENTRY first.
From the Customer Master Maintenance home page, hit "P" until PROFILE is highlighted.

```
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........LO EO 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       >
```

Hit enter which takes you to this pop-up:

```
 PROFILE

 ENTRY
 BUILD
 COPYPROF
 MODFORM
 MODDATE
 SEQUENCE
 PRINT
 TAGS
```

Select ENTRY by pressing enter.

```
Customer code index          CG Louisville              PD321
                     Customer Master Maintenance
*NOTE*
   Customer code........TEST    1 Name.........1test (1234567890)
 ─Customer Profile Entry─────
SEQN   PRODUCT              DESCRIPTION          FM  PRICE   EXP DATE SYMB
  10 []
```

Here you can start adding items to a profile. To enter an item either input the Creation
Gardens – What Chefs Want 5 digit code or search for an item. For example, let's add fresh
carrots to this profile. Hit "S" for Search and enter which brings us to this screen:
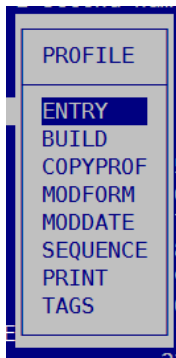
```
Customer code index          CG Louisville                    PMSRCH
                       Customer Master Maintenance
*NOTE*
    Customer code........TEST     1 Name.........1test (1234567890)
 ┌Customer Profile Entry────────────────────────────────────────────┐
 ┌Product Search────────────────────────────────────────────────────┐
 │  PROD #│        DESCRIPTION        │ON HAND│COMMIT│ AVAIL│ EXPECT│ │
 │                                                                    │
 │ 1                                                                  │
 │ 2     ┌──────────────────────────────────────────┐                │
 │ 3     │          Enter search fields             │                │
 │ 4     │                                          │                │
 │ 5     │    Long description..[]                   │                │
 │ 6     │    Packaging.........                     │                │
 │ 7     │                                          │                │
 │ 8     │    At least 3 consecutive non-blank chars│                │
 │ 9     └──────────────────────────────────────────┘                │
 │10                                                                  │
 │11                                                                  │
 │12                                                                  │
 │13                                                                  │
 │14                                                                  │
 │15                                                                  │
 └────────────────────────────────────────────────────────────────────┘
```

Enter the item you want to search for (in this case, "carrot"). You must enter at least 3 characters for PPro to search. Do not enter anything on the "Packaging" line, just enter through.

```
Customer code index          CG Louisville                    PMSRCH
                       Customer Master Maintenance
*NOTE*
    Customer code........TEST     1 Name.........1test (1234567890)
 ┌Customer Profile Entry────────────────────────────────────────────┐
 ┌Product Search────────────────────────────────────────────────────┐
 │  PROD #│        DESCRIPTION        │ON HAND│COMMIT│ AVAIL│ EXPECT│ │
 │                                                                    │
 │ 1                                                                  │
 │ 2     ┌──────────────────────────────────────────┐                │
 │ 3     │          Enter search fields             │                │
 │ 4     │                                          │                │
 │ 5     │    Long description..carrot[]            │                │
 │ 6     │    Packaging.........                     │                │
 │ 7     │                                          │                │
 │ 8     │    At least 3 consecutive non-blank chars│                │
 │ 9     └──────────────────────────────────────────┘                │
 │10                                                                  │
 │11                                                                  │
 │12                                                                  │
 │13                                                                  │
 │14                                                                  │
 │15                                                                  │
 └────────────────────────────────────────────────────────────────────┘
```

```
Customer code index          CG Louisville                    PMSRCH
                       Customer Master Maintenance
*NOTE*
    Customer code........TEST     1 Name.........1test (1234567890)
 ┌Customer Profile Entry────────────────────────────────────────────┐
 ┌Product Search────────────────────────────────────────────────────┐
 │  PROD #│        DESCRIPTION        │ON HAND│COMMIT│ AVAIL│ EXPECT│ │
 │                                                                    │
 │ 1│20450  CARROT -  BULK         50LB CASE 231.51  5.13  226.38   128│
 │ 2│20451  CARROT - LARGE BULK 00037 5LB PACK   -3     2     -5     1 │
 │ 3│20452  CARROT - CELLO 00035    48/1lb CS  10.04   .02  10.02    0 │
 │ 4│20453  CARROT - CELLO          1LB BAG     0      1     -1      1 │
 │ 5│20454  CARROT - COIN CUT     2/5LB CASE   21      0     21     15 │
 │ 6│20456  CARROT - DICED 00320   4/5LB CASE  37.75   .5  37.25    10 │
 │ 7│20457  CARROT - DICED          5LB BAG     0      2     -2      2 │
 │ 8│20460  CARROT - HAND CARVED    5LB CASE   44      1     43     80 │
 │ 9│20462  CARROT - TRI COLOR HAND C 5LB CASE  0      0      0      0 │
 │10│20463  CARROT - MATCHSTICK    4/5LB CASE 135.75 13.25 122.5   40 │
 │11│20465  CARROT - WHOLE PEELED   10LB CASE   5      1      4      0 │
 │12│20466  CARROT - PEEL / SHORTCUT 30/1LB CS 138.85  4  134.85   70 │
 │13│20467  CARROT - PEEL / SHORTCUTS  1LB BAG  0     60    -60    60 │
 │14│20468  CARROT - SHREDDED 06159 4/5LB CASE 196   6.75 189.25  100 │
 │15│20469  CARROT - SHREDDED 06159   5LB BAG   0     19    -19    19 │
 │  │20450  CARBULKLG                                                  │
 1test (1234567890)   PRICE :    28.3500 - LEVEL PRMarket    : 16.584
 Select: |___   Chg_layout Colors Config Days Exceptions Info Lot Quit Search
              Select  Show View                                          >
```

13

Choose which item you would like to add. For this customer, let's add the top item, CARROT –
BULK 50LB CASE by pressing enter. Hit enter 2 more times to take you to the next line on the
profile.

```
Customer code index            CG Louisville                    PD321
                      Customer Master Maintenance
*NOTE*
   Customer code........TEST      1 Name.........1test (1234567890)
 ┌Customer Profile Entry─────────────────────────────────────────────
 SEQN    PRODUCT              DESCRIPTION       FM  PRICE   EXP DATE SYMB
   10 CARBULKLG     CARROT -  BULK       50LB CASE        .00
   15
```

Keep adding items to the profile using the method above.

If you are adding items to an existing profile, hit the END key, then INSERT to add another item.

How to sequence a Profile

Go to the Customer Master Page of the customer.
Hit P for Profile

```
Customer code index          CG Louisville                PD320
                      Customer Master Maintenance

   Customer code........1EM304   1 Name........LYNNETTE JONES
   Redbook pin number...          2 Second name..
   Blue Book ID#........           3 Short name...
                                  4 Sort name....LYNNETTE JON

                    BILL TO                 SHIP TO
  5 Bill name.                    LYNNETTE JONES
  6 Address...                16
  7 Address...                17
  8 Ct/st/zp..                18
  9 County....                19
 10 Country...                20
 11 Phone/ext.                21
 12 Contact...                22
 13 Remarks...                23
 14 Fax num...                24
 15 Email Address...lynnettej@creationgardens.com

 25 Produce categories........LO EP

Select: █___   Add Ar Autocharges Children Contacts Find indeX List Log Lookup
Modify Notes Phone Prices Profile Quit Route Search Stamp View Warehouses      >
```

Then arrow down to SEQUENCE.

```
Customer code index          CG Louisville                PD320
                      Customer Master Maintenance

   Customer code........1EM304   1 Name........LYNNETTE JONES
   Redbook pin number...          2 Second name..
   Blue Book ID#........              ...
                            PROFILE      ...LYNNETTE JON

                    BILL TO   ENTRY              SHIP TO
  5 Bill name.                BUILD    LYNNETTE JONES
  6 Address...                COPYPROF 6
  7 Address...                MODFORM  7
  8 Ct/st/zp..                MODDATE  8
  9 County....                SEQUENCE 9
 10 Country...                PRINT    0
 11 Phone/ext.                TAGS     1
 12 Contact...                         2
 13 Remarks...                      23
 14 Fax num...                      24
 15 Email Address...lynnettej@creationgardens.com

 25 Produce categories........LO EP
```

Go to Sort Profile.

Customer Profile Sequence

```
                        Select Configuration to Load
1 Cu
     .PRODCIN    : PRODUCTION WARE CINCI            0001(0 assigned)
2 Cu PROFILE     : SORT PROFILE                     0001(0 assigned)
3 In

4 So
5 Cu

6 St
7 In






     Use (F3) for all configs, (?) for assigned, (space) to search
```

Determine the Sort Order.
Hit S enter to search for the available options.

```
Cfg=PROFILE    Modified          CG Louisville                    PD320SQ
                          Customer Profile Sequence
        ┌─────────────────────────────────────────────┐
        │ CODE│      DESCRIPTION                        │
        │ PROD Product                                  │
  1 Cus │ SEQN Sequence                        EM304    │
        │ DESC Product description                      │
  2 Cus │ PDNO Numeric code                             │
  3 Inc │ XREF Cust Cross reference code                │
        │ COMM Commodity                                │
  4 Sor │ DEPT Department                     EQN       │
  5 Cut │ CLAS Class                                    │
        │ USAG Usage                                    │
  6 Sta └SEARCH:█─────────────────────────────  5       │
  7 Interval......................... 5
```
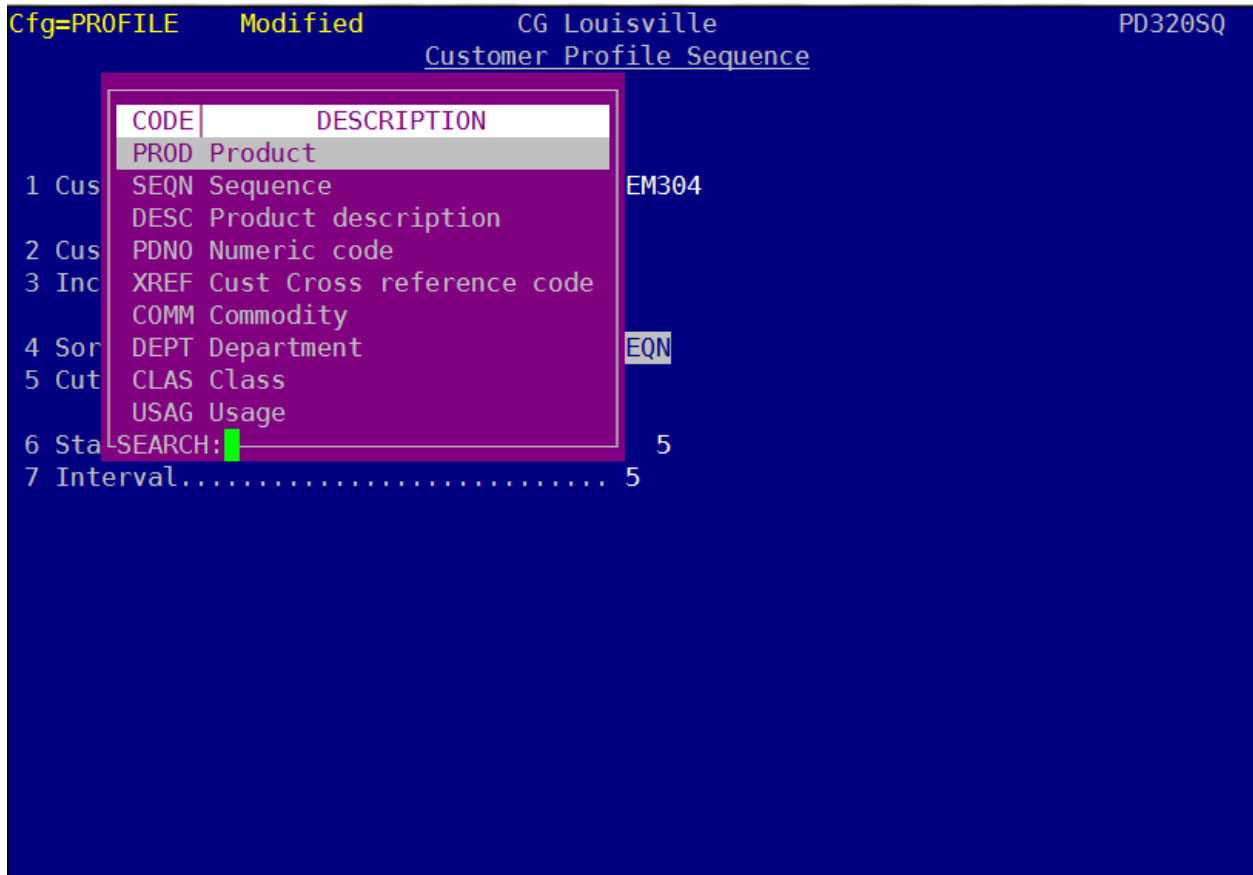
The most commonly used sequences are DESC and DEPT:
DESC – Product Description – sequences the items alphabetically

COMM – Commodity – groups the items by Commodity (drills it down more from the
Department. This will break the profile into each commodity, Apples, Baking, Asian, Beets, Beef
– Boxed, Seafood – Frozen, etc. and is usually not what the customer wants)

DEPT – Department – groups the items by Department (Produce, Meat, Seafood, Disposables,
Dairy, Staples) this is usually what a customer wants if they would like to see each of these
products grouped together.

CLAS – Class – groups the items by Class (drills it down more than Department, but not as much
as Commodity. Keeps like items like Asian Products or Beef together, but would not group
things like Beef and Poultry together)

```
Cfg=PROFILE                    CG Louisville                    PD320SQ
                        Customer Profile Sequence


 1 Customer...........................1EM304

 2 Customer categories................
 3 Include/exclude categories..........I

 4 Sort order........................DEPT
 5 Cutoff date for usage sort..........

 6 Starting sequence number............   5
 7 Interval.......................... 5








Select: ▯___   Config  Go  Modify  Recur  Schedule
```

Hit G for Go then enter to sequence the profile

How to build a profile in BUILD mode

This will let you build a profile based on customers' past orders. On the Customer Master Maintenance home page, hit "P" until PROFILE is highlighted and press enter.   Select BUILD.

You will see this screen reminding you that doing this will delete items not sold since a particular date which you can change on the next screen. Hit enter twice.
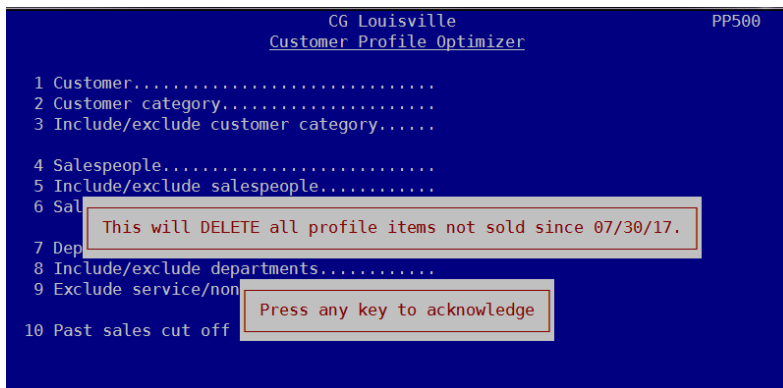
Next you will see this screen. Here you can change the cut-off date on line 10. For instance, if you'd like to build a profile based on the customer's last 6 months orders, simply input the date from 6 months ago. Next hit "G" for GO and your customer's profile will be populated. **Note: whatever was in their profile prior to the cut-off date will be deleted.**

```
Cfg=STD                        CG Louisville                        PP500
                          Customer Profile Optimizer

   1 Customer..............................TEST    1test (1234567890)
   2 Customer category.....................
   3 Include/exclude customer category......I

   4 Salespeople...........................
   5 Include/exclude salespeople...........I
   6 Salesperson source....................1

   7 Departments...........................
   8 Include/exclude departments...........I
   9 Exclude service/non inventory items?...N  N

  10 Past sales cut off date...............07/30/17




Select: ▯___   Config  Go  Modify  Page  Quit  Recur  Schedule
```

How to add Routing and Delivery notes to a customer

If a customer has specific delivery instructions that need to be permanently added to a customer's master file, follow these instructions.

Go to the customer master page. Follow this path: 10 – Master Files → 2 – Customer Files → 1 → Customers. (or use the hot key .32)

```
 PPro 6.1  │  0001  │  CG Louisville                              MFMENUCM

                           ┌─MAIN MENU
                 ┌───Prod┐  │ Produce customer master files
    1 Purcha│    1 Contro│  │ 1 Customers
    2 A/P in│    2 Custom│  │ 2 Prospective customers
    3 Sales │    3 Vendor│  │ 3 A/R codes
    4 Shippi│    4 Produc│  │ 4 Statement codes
    5 Routin│    5 Purcha│  │ 5 Region codes
    6 A/R in│    6 Invent│  │ 6 Sales analysis codes
    7 Invent│    7 Pricin│  │ 7 Credit hold codes
    8 Pricin│    8 Accoun│  │ 8 Credit type codes
    9 Docume│    9 Sales │  │ 9 Customer rebate groups
   10 Master│   10 Shippi│  │ 10 Customer retail zones
   11 Sales │   11 Delive│  │ 11 Volume discount codes
   12 Broker│   12 Grower│  │ 12 Customer visit reason codes
   13 Grower│   13 Custom│  │ 13 Customer master update
   14 Work o│   14 Admini│  │
   15 Utilit│   15 Report│  │ 14 Customer categories
   16 Change│           │  │
```

Search for the customer by entering "S" for Search or using the arrow keys to navigate to Search

```
Customer code index          CG Louisville              PD320
                    Customer Master Maintenance

   Customer code........     1 Name........
   Redbook pin number...     2 Second name..
   Blue Book ID#.......      3 Short name...
                             4 Sort name....

                 ┌────BILL TO────┐        ┌────SHIP TO────┐
 5 Bill name.
 6 Address...                    16
 7 Address...                    17
 8 Ct/st/zp..                    18
 9 County....                    19
10 Country...                    20
11 Phone/ext.                    21
12 Contact...                    22
13 Remarks...                    23
14 Fax num...                    24
15 Email Address...

25 Produce categories.......

Select: █___   Add Ar Config Find indeX List Lookup Modify Page Pagejump Prices
               Profile Quit Rebate Search View                              >
```

Enter at least 3 characters to search for the customer.

```
Customer code index          CG Louisville                   CMSRCH
┌─Customer Search──────────────────────────────────────────────────┐
│   CUST  │    CUSTOMER NAME    │    ADDRESS    │   CITY   │ ST │    │
│                                                                    │
│  1                                                                 │
│  2                                                                 │
│  3                                                                 │
│  4                                                                 │
│  5                                                                 │
│  6                                                                 │
│  7        ┌──────────────────────────────────────┐                │
│  8        │         Enter search fields          │                │
│  9        │                                      │                │
│ 10        │ Name..jack f▋                         │                │
│ 11        │                                      │                │
│ 12        │ At least 3 consecutive non-blank chars│               │
│ 13        └──────────────────────────────────────┘                │
│ 14                                                                 │
│ 15                                                                 │
│ 16                                                                 │
│ 17                                                                 │
│ 18                                                    ALL RECORDS  │
└───────────────────────────────────────────────────────────────────┘
```

Hit the + key 9 times to come to this screen:

```
Customer code index          CG Louisville                   PD320
                      Customer Master Maintenance
     Customer....1JACKF JACK FRY'S
                             DEFAULT INSTRUCTIONS

        PICKING INSTRUCTIONS              ROUTING INSTRUCTIONS
     1 PRIORITY! PRIORITY!             3 Double check order before
                                         departure.


                                         SUNDAYS- deliver after 800




        INVOICE INSTRUCTIONS              LOADING INSTRUCTIONS
     2 PRIORITY                         4 PRIORITY
       Sundays- deliver after 800am




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

Enter the number 3 to enter (or change) Routing Instructions.
```
```

```
Customer code index            CG Louisville                    PD320
                        Customer Master Maintenance
     Customer....1JACKF JACK FRY'S
                          DEFAULT INSTRUCTIONS

       PICKING INSTRUCTIONS              ROUTING INSTRUCTIONS
     1 PRIORITY! PRIORITY!           3 Double check order before
                                       departure.


                                       SUNDAYS- deliver after 800



       INVOICE INSTRUCTIONS             LOADING INSTRUCTIONS
     2 PRIORITY                       4 PRIORITY
       Sundays- deliver after 800am




ESC=end text field    F3=spell check    INS=save/load text
```
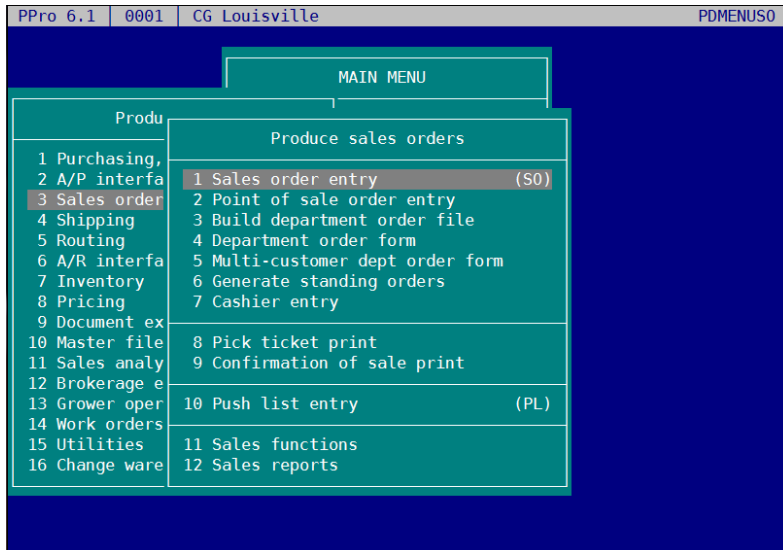
Hitting the Tab key will clear the field (this is universal in Ppro. Tab always clears out a field) or update the text in the Routing Instructions as necessary. Dispatch will see these instructions.

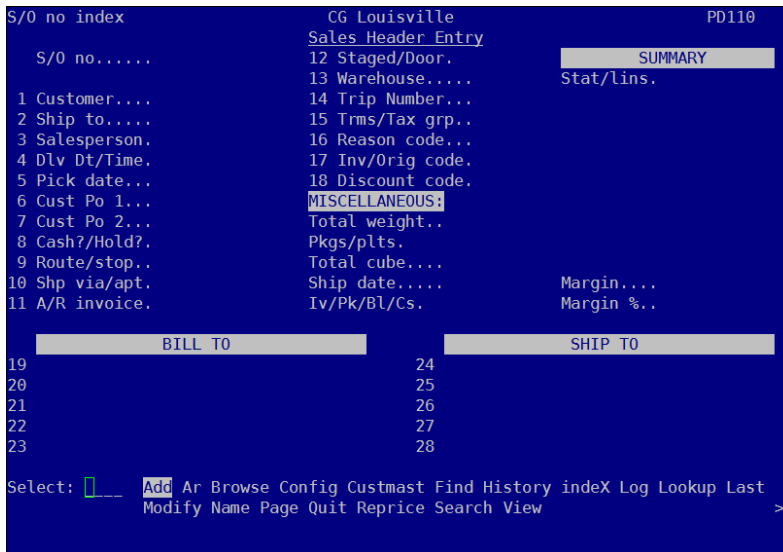****It is important to also talk with dispatch to make sure the routing request can happen.****

How to place an order using a Profile

Follow this path to get to the order placement screen:

1 Produce Pro → 3 Sales Orders → 1 Sales Order Entry

```
PPro 6.1 | 0001 | CG Louisville                                    PDMENUSO

                          ┌─────────────────────────┐
                          │        MAIN MENU        │
                          └─────────────────────────┘
          ┌─────────┬──────────────────────────────────────┐
          │  Produ  │        Produce sales orders          │
          │ 1 Purchasing,│                                  │
          │ 2 A/P interfa│ 1 Sales order entry       (SO)   │
          │ 3 Sales order│ 2 Point of sale order entry      │
          │ 4 Shipping   │ 3 Build department order file    │
          │ 5 Routing    │ 4 Department order form          │
          │ 6 A/R interfa│ 5 Multi-customer dept order form │
          │ 7 Inventory  │ 6 Generate standing orders       │
          │ 8 Pricing    │ 7 Cashier entry                  │
          │ 9 Document ex│                                  │
          │10 Master file│ 8 Pick ticket print              │
          │11 Sales analy│ 9 Confirmation of sale print     │
          │12 Brokerage e│                                  │
          │13 Grower oper│10 Push list entry         (PL)   │
          │14 Work orders│                                  │
          │15 Utilities  │11 Sales functions                │
          │16 Change ware│12 Sales reports                  │
          └─────────┴──────────────────────────────────────┘
```

Hit "A" for ADD

```
S/O no index              CG Louisville              PD110
                        Sales Header Entry
    S/O no......      12 Staged/Door.        ┌─────SUMMARY─────┐
                      13 Warehouse.....      Stat/lins.
 1 Customer....       14 Trip Number...
 2 Ship to.....       15 Trms/Tax grp..
 3 Salesperson.       16 Reason code...
 4 Dlv Dt/Time.       17 Inv/Orig code.
 5 Pick date...       18 Discount code.
 6 Cust Po 1...       MISCELLANEOUS:
 7 Cust Po 2...       Total weight..
 8 Cash?/Hold?.       Pkgs/plts.
 9 Route/stop..       Total cube....
10 Shp via/apt.       Ship date.....        Margin....
11 A/R invoice.       Iv/Pk/Bl/Cs.          Margin %..

      ┌──────BILL TO──────┐        ┌──────SHIP TO──────┐
   19                            24
   20                            25
   21                            26
   22                            27
   23                            28

Select: [ ]___  Add Ar Browse Config Custmast Find History indeX Log Lookup Last
                 Modify Name Page Quit Reprice Search View              >
```

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

```
                      Sales Header Entry
     S/O no......      12 Staged/Door.        SUMMARY
                       13 Warehouse.....CG    Stat/lins.0          0
 1 Customer....s       14 Trip Number...
 2 Ship to.....        15 Trms/Tax grp..
 3 Salesperson.LMJ     16 Reason code...
 4 Dlv Dt/Time.09/29/17 17 Inv/Orig code.
 5 Pick date...        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..        Total cube....     .000
10 Shp via/apt.        Ship date.....        Margin....
11 A/R invoice.        Iv/Pk/Bl/Cs. 0  0    0  0 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              Enter search fields
 9
10         Name..test
11
12         At least 3 consecutive non-blank chars
13
14
15
16
17
18
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. Or hit "C" enter and be taken to a calendar to select the date. 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.

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.

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       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 00080    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▯        │              ACT COST
└──────────────────────────────┘
PRICE SOURCE:LEVEL PRICE    /5+                 MARGIN %
20450-CARBULKLG               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
```

Here is a useful tool while on the customer profile.

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. If a case is showing 0 on hand or negative inventory, it's likely that item is out of stock.

```
—S/O:04011010—10/10/17——1test (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 00080    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
```

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. On the Sales Header Entry page, select "Entry" by hitting "E" or using your arrows to highlight and then press enter.

```
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/apt.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 1test (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 brings you to a blank order screen

```
S/O no index              CG Louisville              PD114
*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
 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.      ┌─────────────────┐
B:6305551212 S:PRIMARYPHONE 13 Warehouse.....LE  │    SUMMARY      │
 1 Customer....TEST        14 Trip Number...    Stat/lins.0       0
┌Product Search─────────   14 Trip Number...    Invoice...     .00
│  PROD #│      DESCRIPTION      │ON HAND│COMMIT│ AVAIL│ EXPECT│
│                                                              │
│  1                                                           │
│  2                                                           │
│  3        ┌──────────────────────────────────────┐          │
│  4        │       Enter search fields            │          │
│  5        │                                      │          │
│  6        │  Long description..film▌             │          │
│  7        │  Packaging.........                  │          │
│  8        │                                      │          │
│  9        │    At least 3 consecutive non-blank chars │     │
│ 10        └──────────────────────────────────────┘          │
│ 11                                                           │
│ 12                                                           │
│ 13                                                           │
│ 14                                                           │
│ 15                                                           │
└──────────────────────────────────────────────────────────────┘
```

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.      ┌─────────────────┐
B:6305551212 S:PRIMARYPHONE 13 Warehouse.....LE  │    SUMMARY      │
 1 Customer....TEST        14 Trip Number...    Stat/lins.0       0
┌Product Search─────────                        Invoice...     .00
│  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*                     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
 ┌─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
```
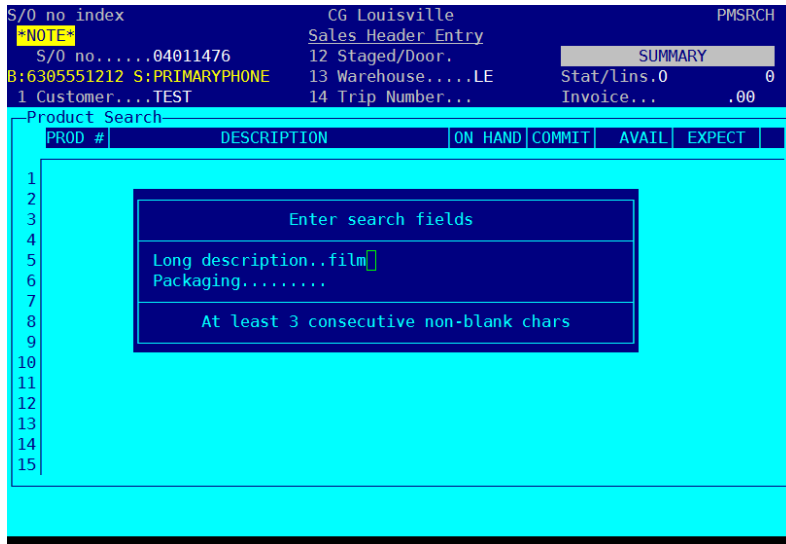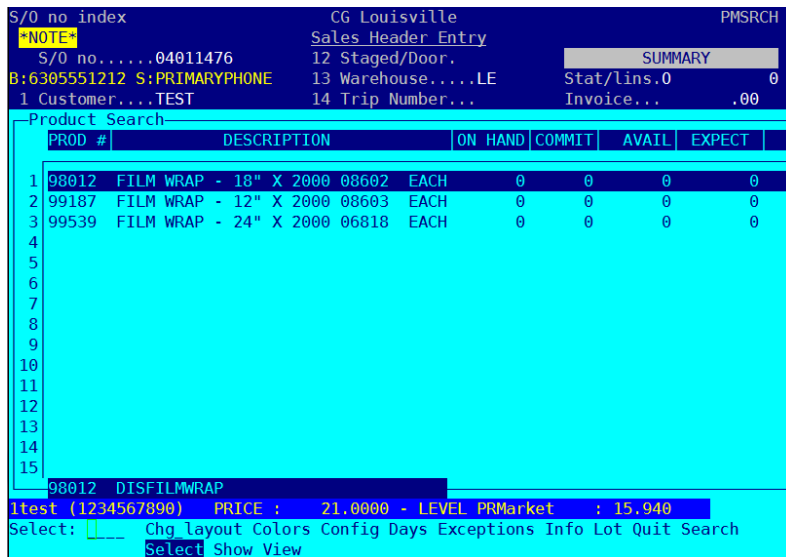
Now hit escape until you get out of the Sales Header Entry page. The order is now in the system and will be processed.

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.

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                   Enter search fields
    4
    5        Long description..pepper
    6        Packaging........
    7
    8            At least 3 consecutive non-blank chars
    9
   10
   11
   12
   13
   14
   15
```

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/BKO    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    >
```

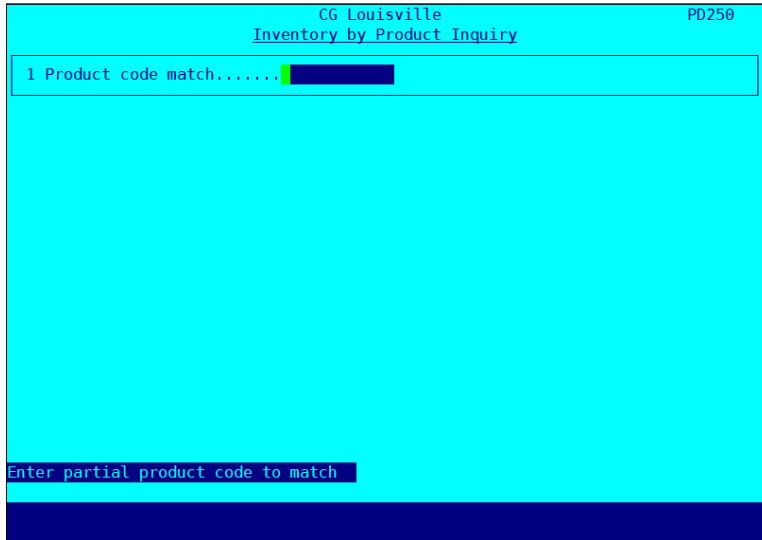Arrow down to the warehouse that shows a value in the Expect column, then press Enter.

```
┌─Product Inventory by Warehouse────────────────────── IMINQ─
│  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.
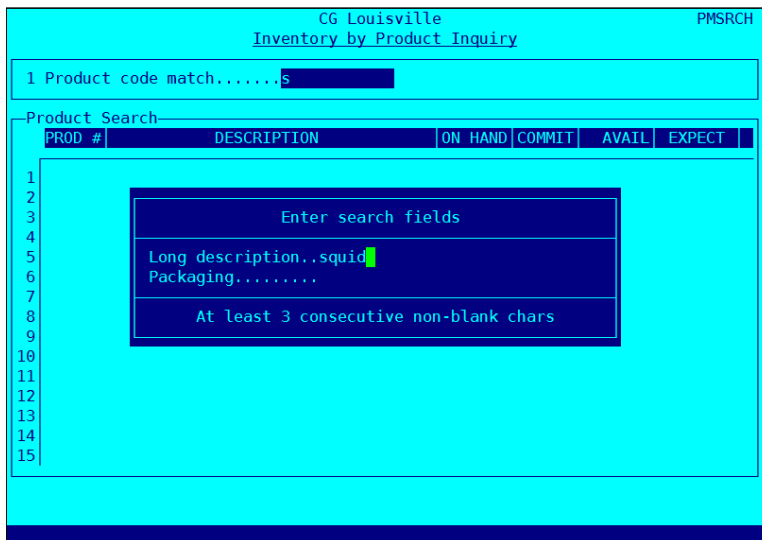
How to find information about a product

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            │        Enter search fields        │
    5            │                                   │
    6            │ Long description..squid█          │
    7            │ Packaging.........                │
    8            │                                   │
    9            │   At least 3 consecutive non-blank chars │
   10            └──────────────────────────────────┘
   11
   12
   13
   14
   15
```

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.......s

  ┌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 4SQUT5E 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 4SQUT3E 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   4SQUTT5────────────────────────────────────────────┘
  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/48508/4SQUTT5              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  >
```

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: ▌___   Allcomp Altunit Attachments Days Department Distribute 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  Prodcatg  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                        │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
│                                            ┌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 à 1 – Product files à 1 – Products

Or hit the speed key, .34

```
Produce Pro | 0001 | CG Louisville                        MFMENUPM

                    Produce master files

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

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              PD340
                         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...........   INVENTORY
10 Default sales/market cost unit....    On-hand quantity......
11 Retail unit/alt report unit.......    Committed quantity....
12 Product/pound type/entry/var wght.    Available quantity....
13 Broken inventory?/pricing?........    Expected quantity.....
14 Repack item?/auto-split?..........
15 Auto-split at receiving?..........
16 Active/future active?/reason......


 (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...............SEAFOOD
 6 Class...................SS
 7 Department..............SS
 8 Buyer...................KB
 9 Default purchase unit............        INVENTORY
10 Default sales/market cost unit....      On-hand quantity......    70.50
11 Retail unit/alt report unit.......      Committed quantity....      .00
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
      │ AJC  Joe Campbell                │
 CLASS│ AJT  John Thomas                 │
 5 Com│ AL   Adam Lasita                 │
 6 Cla│ AMS  Aaron Shular                │
 7 Dep│ AN   Audrey Nelson               │
 8 Buy│ ANS  Tony Speratos               │
 9 Def│ APS  April Smiley               │TORY
10 Def│ AV   Abby Voss                   │hand quantity......    70.50
11 Ret│ AW   Aaron Wannameuhler          │mitted quantity....      .00
12 Pro│ BB   Beth Boyer                  │ilable quantity....    70.50
13 Bro└SEARCH:▮─────────────(F3)  Active only─ected quantity.....     .00
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.

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

This menu will be brought up.

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.

SEQN	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 CONTAINE 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

S/O:04844356—01/02/19—TEST CUSTOMER AND USER   **CHARGE**

CN: LOCN: N D01 01   ACT COST
PRICE SOURCE:2NDY PRICE LIST 4/CO   MARGIN %
10300-BANA   .00   .00   .0

How to Search for an order

Go to the Sales Order Entry screen.

3 – Sales Orders → 1 – Sales order entry
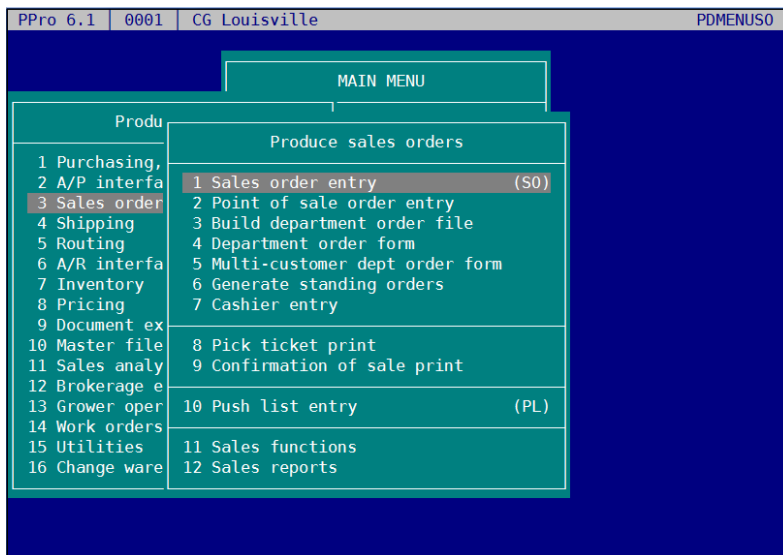
Upon entering that screen, then hit "S" to highlight Search on the bottom menu.

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
   S/O no......            12 Staged/Door.            SUMMARY
  ┌─Sales Order Search Options──────────────────────────────────┐
 1│  1 Customer.......................S ▓                        │
 2│  2 Customer category...............                         │
 3│  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│                                                             │
  │  9 Ship via code...................                         │
  │ 10 Origination code................                         │
19│ 11 Ship-to customer................                         │
20│ 12 Customer credit codes...........                         │
21│ 13 Inc./excl. credits codes........I                        │
22│ 14 Date range.....................06/13/18                  │
23│ 15 Date type?.....................S                         │
  └─────────────────────────────────────────────────────────────┘
(S)earch
```
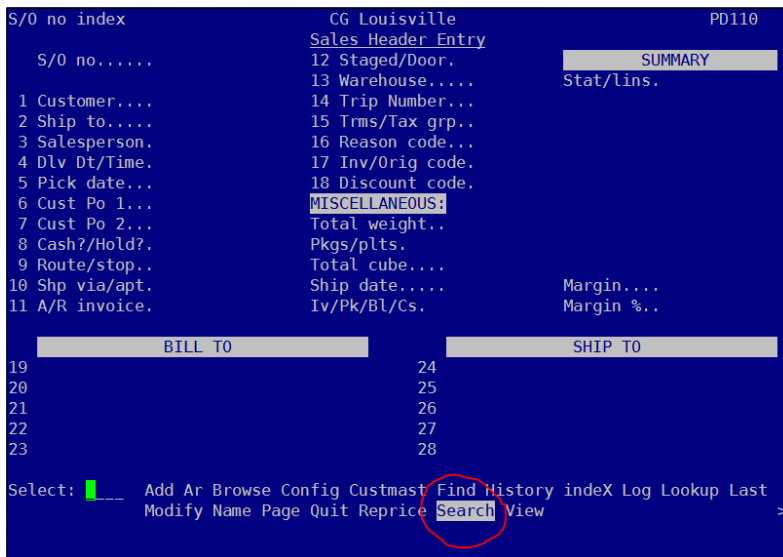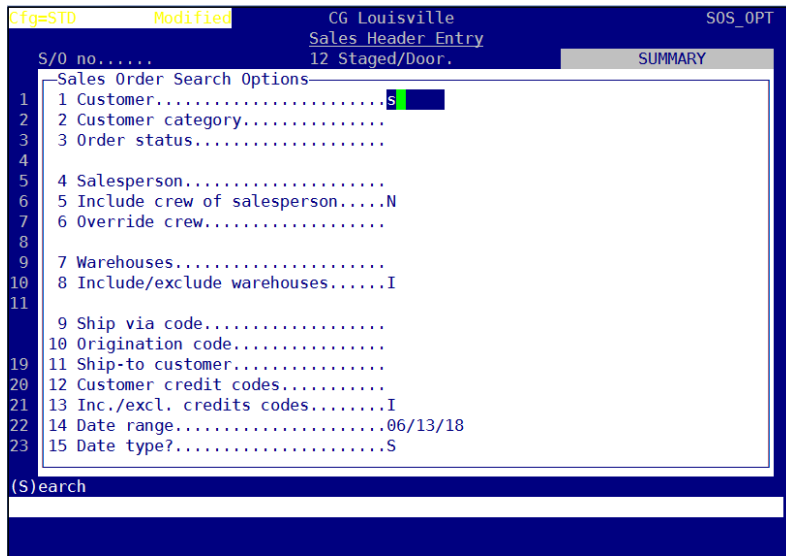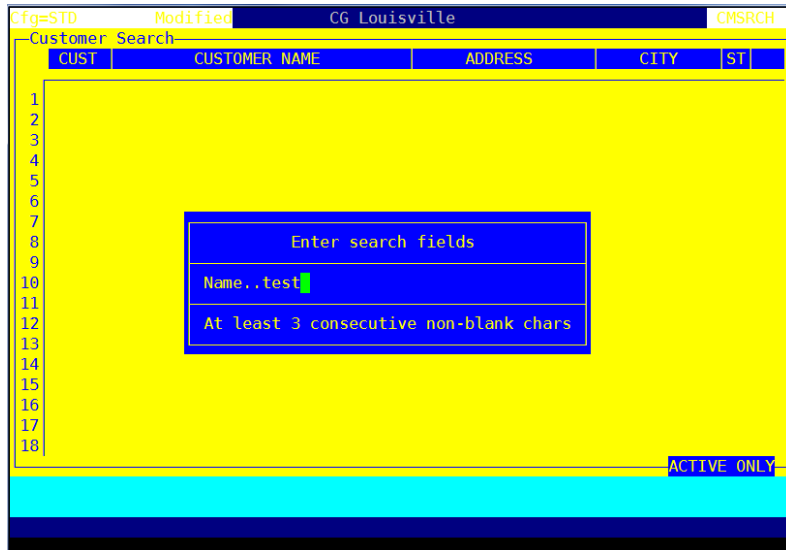
Type in at least 3 characters to search. For this example, I am searching for the Test customer.

```
Cfg=STD        Modified        CG Louisville                CMSRCH
 ┌─Customer Search───────────────────────────────────────────────┐
 │  CUST  │    CUSTOMER NAME    │    ADDRESS    │   CITY   │ ST │ │
 │                                                               │
 1│                                                              │
 2│                                                              │
 3│                                                              │
 4│                                                              │
 5│                                                              │
 6│                                                              │
 7│        ┌──────────────────────────────────────┐             │
 8│        │       Enter search fields            │             │
 9│        │                                      │             │
10│        │ Name..test▓                          │             │
11│        │                                      │             │
12│        │ At least 3 consecutive non-blank chars│            │
13│        └──────────────────────────────────────┘             │
14│                                                              │
15│                                                              │
16│                                                              │
17│                                                              │
18│                                                  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 Select
               Showall View                                        >
```

Then hit Enter.

```
Cfg=STD        Modified        CG Louisville                    SOS_OPT
                               Sales Header Entry
   S/O no......           12 Staged/Door.            SUMMARY
 ┌Sales Order Search Options─────────────────────────────────┐
 1 │ 1 Customer.....................TEST   TEST CUSTOMER AND USER │
 2 │ 2 Customer category..............                         │
 3 │ 3 Order status...................A                        │
 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 │                                                            │
   │ 9 Ship via code..................                         │
   │10 Origination code...............                         │
19 │11 Ship-to customer...............                         │
20 │12 Customer credit codes..........                         │
21 │13 Inc./excl. credits codes.......I                       │
22 │14 Date range....................06/13/18                  │
23 │15 Date type?....................S                         │
 └────────────────────────────────────────────────────────────┘
(U)nshipped  (S)hipped or transferred  (O)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│0NP│     .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      │ O│11/29/18│11/29/18│JVC│     .00│
│ 9 04805982 TEST CUSTOMER AND USER      │ O│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                          >
```

You can choose a sales order, click enter and then open that sales 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│0NP│     .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      │ O│11/29/18│11/29/18│JVC│     .00│
│ 9 04805982 TEST CUSTOMER AND USER      │ O│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          ┌────SUMMARY────┐
    S/O no......04745827     12 Staged/Door.          │Stat/lins.T        1│
B:6305551212 S:PRIMARYPHONE  13 Warehouse.....CG      │Product...    258.10│
 1 Customer....TEST          14 Trip Number...        │Tax.......     15.49│
 2 Ship to.....             15 Trms/Tax grp.. 0 KE    │Invoice...    273.59│
 3 Salesperson.CDS          16 Reason code...         └────────────────────┘
 4 Dlv Dt/Time.11/06/18     17 Inv/Orig code.I
 5 Pick date...11/06/18  PMW 18 Discount code.
 6 Cust Po 1...             MISCELLANEOUS:
 7 Cust Po 2...             Total weight..     29.000
 8 Cash?/Hold?.N N          Pkgs/plts.    5.00      0
 9 Route/stop..BG28    5    Total cube....    27.730
10 Shp via/apt.D            Ship date.....11/06/18   Margin....
11 A/R invoice.04745827     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   >
```

47

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  12 Staged/Door.          SUMMARY
B:6305551212 S:PRIMARYPHONE  13 Warehouse.....CG    Stat/lins.T          1
1 Customer....TEST       14 Trip Number...     Product...    258.10
2 Ship to.....           15 Trms/Tax grp.. 0 KE  Tax.......    15.49
3 Salesperson.CDS        16 Reason code...    Invoice...    273.59
4 Dlv Dt/Time.11/06/18   17 Inv/Orig code.I
 ─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 / CO                             .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 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.O         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...BO   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...           Total weight..      4.000
 8 Cash?/Hold?.N N        Plt/pkgs..    .05   2.00
 9 Route/stop..BG28    5  Total cube....      4.888
10 Shp via/apt.D          Ship date.....        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

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.O         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...BO   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     │   Void options      │.000
 9 Route/stop..BG28  5 │                     │.00
10 Shp via/apt.D       │Void this sales order│.888
11 A/R invoice.        │Abort                │  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
```

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

```
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...BO      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...            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_
                        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.....    ┌─Void Reason Codes─────────────────────────┐
 3 Salesperson.CDS │  CODE   DESCRIPTION                        │
 4 Dlv Dt/Time.01/1│                                            │
 5 Pick date...01/1│  1  CL    Customer Cancelled               │
 6 Cust Po 1...    │  2  OT    OTHER:                           │
 7 Cust Po 2...    │  3  QU    Quality Discovered               │
 8 Cash?/Hold?.N N │  4  SH    Short Product                    │
 9 Route/stop..BG28│  5  TS    Sales Order Testing              │
10 Shp via/apt.D   │  6                                         │
11 A/R invoice.    │  7                                         │
                   │  8                                         │
          BIL      │  9                                         │
19 Test User       │ 10                                         │
20                 │ 11                                         │
21 1235 JEFFERSON S│ 12                                         │
22                 │ 13                                         │
23 LOUISVILLE      │ 14                                        A│
                   │ 15                                         │
                   │                            ─ACTIVE ONLY──  │
                   └────────────────────────────────────────────┘

Select: █___   Config  Find  Quit  Select  Showall
```

Hit enter.

```
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 Cust┌─Void reason comments──────┐umber...      Product...     59.90
 2 Ship │█                         │ax grp.. 0 KE  Tax.......      3.59
 3 Sales│                          │ code...BO     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 print an invoice

After you have located the order you'd like to print, Hit I for Invoice.

```
S/O no index              CG Louisville            PD110
*MISTAKE*              Sales Header Entry
   S/O no......04891274  12 Stage/Dor.                SUMMARY
B:6305551212 S:PRIMARYPHONE  13 Warehouse.....NA    Stat/lins.T      18
 1 Customer....TEST        14 Trip Number...00470267 Product...   541.35
 2 Ship to.....            15 Trms/Tax grp.. 0 KE    Tax.......    32.48
 3 Salesperson.CDS         16 Reason code...          Invoice...   573.83
 4 Dlv Dt/Time.01/22/19    17 Inv/Orig code.I WB
 5 Pick date...01/21/19 1CS 18 Discount code.
 6 Cust Po 1...TEXAS DE BRAZIL
 7 Cust Po 2...            Total weight..    124.000
 8 Cash?/Hold?.N N         Plt/pkgs..   .04   23.00
 9 Route/stop..BG28  196   Total cube....    19.566
10 Shp via/apt.D           Ship date.....01/22/19   Margin....
11 A/R invoice.04891274    Iv/Pk/Bl/Cf. 1  2   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 Airway Allo Appointment Appt_stop Ar Asn Attachments Bol
Browse Charges Config Confsale Copy Entry Find indeX Invoice Lines Log Lookup
Last Mistakes Pick QC Quit Search Ship Stamp Times Trip View Void        >
```
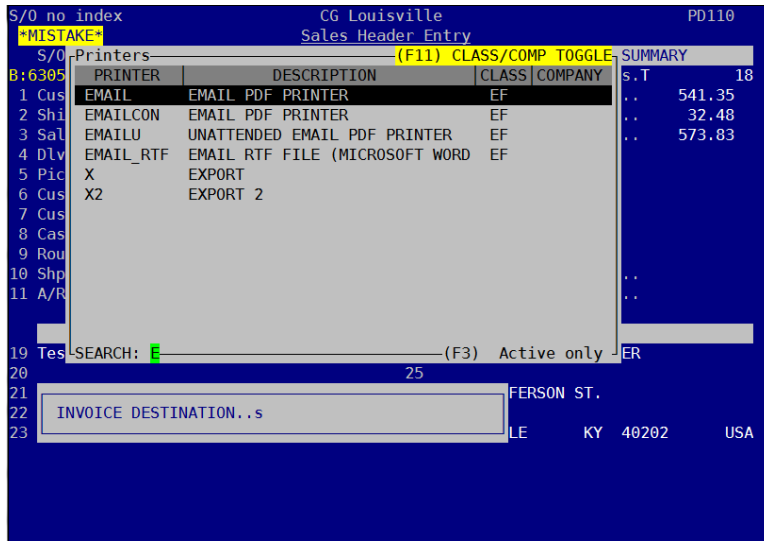
Hit enter.

```
S/O no index              CG Louisville            PD110
*MISTAKE*              Sales Header Entry
   S/O no......04891274  12 Stage/Dor.                SUMMARY
B:6305551212 S:PRIMARYPHONE  13 Warehouse.....NA    Stat/lins.T      18
 1 Customer....TEST        14 Trip Number...00470267 Product...   541.35
 2 Ship to.....            15 Trms/Tax grp.. 0 KE    Tax.......    32.48
 3 Salesperson.CDS         16 Reason code...          Invoice...   573.83
 4 Dlv Dt/Time.01/22/19    17 Inv/Orig code.I WB
 5 Pick date...01/21/19 1CS 18 Discount code.
 6 Cust Po 1...TEXAS DE BRAZIL
 7 Cust Po 2...            Total weight..    124.000
 8 Cash?/Hold?.N N         Plt/pkgs..   .04   23.00
 9 Route/stop..BG28  196   Total cube....    19.566
10 Shp via/apt.D           Ship date.....01/22/19   Margin....
11 A/R invoice.04891274    Iv/Pk/Bl/Cf. 1  2   0  0 Margin %..

            BILL TO                           SHIP TO
19 Test User                 24 TEST CUSTOMER AND USER
20                           25
21                              FERSON ST.
22  INVOICE DESTINATION..[ ]
23                              LE    KY  40202    USA

(S)earch
```
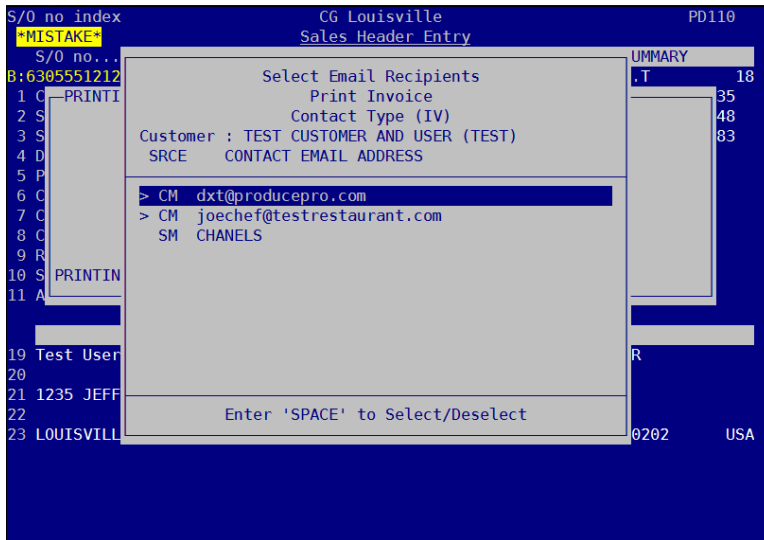
Hit S enter to search for a printer. Hit enter to print to the selected printer.

If you'd like to email a copy of an invoice, find Email

Hit enter. A list of contacts will appear. The contacts with > will be sent the invoice. Use the space bar to select/deselect contacts.

If this invoice needs to be emailed to a recipient not listed, deselect all then hit enter and enter the email address.

```
S/O no index                CG Louisville                    PD110
*MISTAKE*                 Sales Header Entry
   S/O no......04891274   12 Stage/Dor.              SUMMARY
B:6305551212 S:PRIMARYPHONE  13 Warehouse.....NA    Stat/lins.T      18

                     Enter Email Destination

  Mail Address..ljones@whatchefswant.com
  Subject.......INVOICE - #04891274   (TEXAS DE BRAZIL)
  Comment.......




11 A

           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: (O)perator, (B)ook, (G)roup, (M)aintain, or (C)lear
```

Hit enter 3 times and the invoice will be sent to the email listed.

How to find the location of a customer's truck

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 OXMOOR COURT           26 102 OXMOOR 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▓▓▓▓
                                        Pallets out/in...   .16     .00
 1 Route code..........L061             Total packages...  181.00
 2 Description..11 HURSTONE 502.744.3588 Total/Max Wght...1598.54       0
 3 Warehouse..........CG CG Louisville  Total/Max Cube...101.04        0
 4 Dispatch date/time...01/17/19  07:12AM  Stops........... 15
 5 Dispatch status / category....        Total/down hrs...   .00     .00
 6 Transport type / lane Id......        Total gallons....   .000
 7 Driver/Phone..1BT Brian T 502-298-9785 5020-298-9785
 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. 073243 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 O 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_out│S=Staging area│T=Temperature│D=Date & Times│E=sEal number│M=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 Enter a Standing Order

Standing orders of stock product can be entered by anyone. A standing order of a special order product must be entered by the purchaser of that product.

Standing orders are populated on Sundays for the coming week. If you enter a standing order on a Monday, the orders won't be created until the following Sunday for the week ahead.

No special cut meat or Prep Kitchen items should be put on a standing order to be delivered on Mondays. We do not process meat or Prep Kitchen over the weekend, so there would be no way to produce these items in time for a Monday standing order.

If a customer wants to make a change to a standing order for one week, be mindful that the changes have to be made after the orders populate on Sundays.

Standing orders can only be made weekly, not bi-weekly or monthly.

Go to the customer master page of the customer who needs the special order.

Hit the "." Key and then "s" 5 times to get to Standing.

Enter the product code or "s" enter to search for the product.

```
Customer code index          CG Louisville                PD320S
                       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...
                                   4 Sort name....TEST CUSTOME
  ┌Customer Standing Order Maintenance─────────────────────────
  │        DESCRIPTION           SUN   MON   TUE   WED   THU   FRI   SAT
  │                              ┌──────────────────────────┐
  │                              │ PRODUCT CODE..           │
  │                              └──────────────────────────┘
  │
  │
  │
  │
  │
  │
  │PRODUCT:                    CONDITION:
```

Enter the quantity for each day needed. In this example, I have entered 1 case of red delicious apples to be delivered every Monday, Wednesday and Friday.

```
Customer code index          CG Louisville                PD320S
                       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...
                                   4 Sort name....TEST CUSTOME
  ┌Customer Standing Order Maintenance─────────────────────────
  │        DESCRIPTION           SUN   MON   TUE   WED   THU   FRI   SAT
  │APPLE - RED DELICIOUS 00180 88 CT CS   0     1     0     1     0     1     0
  │
  │
  │
  │
  │
  │
  │
  │PRODUCT:10200-APPRED88    ─CONDITION:
         SUNDAY PICKING INSTRUCTION:
               INVOICE INSTRUCTION:

C=Comments S=Seqn Z=Zero <space>=Product search O=Condition L=Colors M=More
```

If a customer already has a standing order for any product, hit Insert to add another line for a different product.

How to Exclude a Product for a Customer

There may be instances where a customer never wants to get a certain product. Produce Pro can exclude a product making it unable to be ordered. For example, Test Customer never wants 5x6 tomatoes.

Go to the Customer Master Maintenance page. 1 → 10 → 2 → 1. Or by hitting .32

```
 PPro 6.1  | 0001 | CG Louisville                          MFMENUCM
 ┌─────────────────────────────────────────────────────────┐
 │                    ┌─────────────────────┐                │
 │                    │      MAIN MENU      │                │
 │      ┌─ Produ ─────┴──────────┬──────────┴──────────────┐ │
 │      │              Produce m │ Produce customer master files│
 │      │  1 Purchasing,         │                         │ │
 │      │  2 A/P interfa │ 1 Control fil │  1 Customers     │ │
 │      │  3 Sales order │ 2 Customer fi │  2 Prospective customers │
 │      │  4 Shipping    │ 3 Vendor file │  3 A/R codes     │ │
 │      │  5 Routing     │ 4 Product fil │  4 Statement codes│ │
 │      │  6 A/R interfa │ 5 Purchasing  │  5 Region codes  │ │
 │      │  7 Inventory   │ 6 Inventory f │  6 Sales analysis codes │
 │      │  8 Pricing     │ 7 Pricing fil │  7 Credit hold codes │
 │      │  9 Document ex │ 8 Accounting  │  8 Credit type codes │
 │      │ 10 Master file │ 9 Sales files │  9 Customer rebate groups │
 │      │ 11 Sales analy │ 10 Shipping fi │ 10 Customer retail zones │
 │      │ 12 Brokerage e │ 11 Delivery fi │ 11 Volume discount codes │
 │      │ 13 Grower oper │ 12 Grower file │ 12 Customer visit reason codes │
 │      │ 14 Work orders │ 13 Customer do │ 13 Customer master update │
 │      │ 15 Utilities   │ 14 Administrat │                 │ │
 │      │ 16 Change ware │ 15 Reports men │ 14 Customer categories │
 │      └───────────────┴───────────────┴─────────────────┘ │
 └─────────────────────────────────────────────────────────┘
```

Search for the customer

```
Customer code index            CG Louisville            PD320
                       Customer Master Maintenance

     Customer code........        1 Name........
     Redbook pin number...        2 Second name..
     Blue Book ID#........        3 Short name...
                                  4 Sort name....

               ┌──── BILL TO ────┐      ┌──── SHIP TO ────┐
  5 Bill name.
  6 Address...                    15
  7 Address...                    16
  8 Ct/st/zp..                    17
  9 Country...                    18
 10 Phone/ext.                    19
 11 Contact...                    20
 12 Remarks...                    21
 13 Fax num...                    22
 14 Email Address...

 23 Produce categories........

Select: [ ]___   Add Ar Config Find indeX List Modify Page Pagejump Prices Profile
                 Quit Rebate Search View Formulas Field_srch              >
```

58

And select the customer

Hit the "." Key to bring up the secondary menu and then hit "E" until you highlight "Exceptions". You can also use the arrow keys to navigate to "Exceptions".

```
Customer code index              CG Louisville                    PD320
                            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...
                                  4 Sort name....TEST CUSTOME

                 BILL TO                         SHIP TO
 5 Bill name.Test User              TEST CUSTOMER AND USER
 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
Select: |___   Add  Address  Ar  Banking  Broker  Children  Commissions  Config
              Contacts  Copy  Custorder  Directions  Ecomprod  Emplink
              Employees  Exceptions  Find  Group_price  indeX  Info  In_out
              List  Log  Map  Mistakes  Modify  Next  Notes  Page  Pagejump
              Pallets  Phone  Prev  Prices  Profile  Prospect  Quit  Rebate
              Reschedule  Route  Search  Showcatg  Splitorder  Stamp  Standing
              Sub_cust  View  Visit  Warehouses  Documents  Formulas  Field_srch
              Imagedocs  Instructions  Prepick  Temperature               <
```

Hit enter when you have reached this screen

```
              EXCEPTIONS

     Exclusions by:
         Product code
         Class
         Commodity
         Department
         Product selection code
         Lot-related
     Inclusions by:
         Product code
         Class
         Commodity
         Department
         Product selection code
     Proprietary items
     More Information
```

Hit the Insert key on your keyboard to insert a new exception.

Hit "S" enter to search for the item then type in the item.

Arrow down until you have found the item.

```
Customer code index          CG Louisville                   PMSRCH
                      Customer Master Maintenance
*NOTE*
    Customer code.......TEST     1 Name.........TEST CUSTOMER AND USER
    Redbook pin number...         2 Second name..
  ┌Product Search──────────────────────────────────────────────────┐
  │  PROD #│       DESCRIPTION        │ON HAND│COMMIT│ AVAIL│ EXPECT│ │
  │                                                                  │
  │ 1│50202  TOMATO - 5X5 VINE RIPE  2 LAYER CS   178     4    174      16 │
  │ 2│50203  TOMATO - 5X6 VINE RIPE  2 LAYER CS  656.5   12   644.5     96 │
  │ 3│50204  TOMATO - 6X6          25 LB CS       136    16    120      30 │
  │ 4│50300  TOMATO - CHERRY       12 PT CS        41   214.5 -173.5    65 │
  │ 5│50301  TOMATO - CHERRY          PINT          0    17    -17      18 │
  │ 6│50302  TOMATO - RED GRAPE    12 PT CASE      395    24    371     562 │
  │ 7│50303  TOMATO - RED GRAPE       PINT         84    41     43       0 │
  │ 8│50306  TOMATO - YELLOW GRAPE   12 PT CS     11.5    2     9.5      0 │
  │ 9│50307  TOMATO - YELLOW GRAPE   PINT - EA     25     0     25       0 │
  │10│50901  CHERRY HEIRLOOM TOMATOES 12CT CASE   37.22   4    33.22    160 │
  │11│50902  CHERRY HEIRLOOM TOMATOES     PINT     60     0     60       0 │
  │12│90533  TOMATO - PEELED ITALIAN  32 OZ CAN    22     0     22       0 │
  │13│90534  TOMATO - PEELED SAN MARZAN #10 CAN    31     0     31       0 │
  │14│90535  TOMATO PASTE - CANNED 12OZ CA EACH    99     0     99       0 │
  │15│93123  SUNDRIED TOMATOES - JULIENNED   LB    23     0     23       0 │
  │   50203  TOM5X6                                                   │
PRICE :     40.7941 - COMP FILE FORMULA           Market    : 28.555
Select: |___   Chg layout Colors Config Days Exceptions Info Lead Lot Quit Search
                Select Show Specord View
```

Hit Enter. You can add an expiration date if that applies. You can also leave that field blank and the item will not have an expiration date.

```
Customer code index          CG Louisville                   CPXENT
                      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...
  ┌Excluded products entry──────────────────────────────────────────┐
  │   PRODUCT              DESCRIPTION          EXP DATE MAX PRIC RS │
  │  APPREDEA     APPLE - RED DELICIOUS      EA 08/18/16    10.00    │
  │ 5│TOM5X6       TOMATO - 5X6 VINE RIPE    2 LAYER CS                │
  │ 6│                                                                │
  │ 7│                                                                │
  │ 8│                                                                │
  │ 9│                                                                │
  │10│                                                                │
  │11│                                                                │
  │12│                                                                │
  │13│                                                                │
  │14│                                                                │
  │                                                                  │
  23 Produce categories........LO EO PL PY VN LE BF

(C)alendar
A=Alt prods|K=Colors|P=Purge Expired|D=Pickdate|F11=Other
```

Hit enter 3 times to bring you to the next line. You can continue adding exclusions if needed, or you can hit escape three times to go back to the customer master. **You must enter through to the next line. Otherwise, your exclusion will not be saved.**

```
Customer code index          CG Louisville              CPXENT
                        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...
    ┌─Excluded products entry─────────────────────────────────────┐
    │   PRODUCT              DESCRIPTION           EXP DATE MAX PRIC RS│
    │ APPREDEA      APPLE - RED DELICIOUS       EA 08/18/16    10.00│
    │5 TOM5X6       TOMATO - 5X6 VINE RIPE    2 LAYER CS         .00│
    │6                                                              │
    │7                                                              │
    │8                                                              │
    │9                                                              │
    │10                                                             │
    │11                                                             │
    │12                                                             │
    │13                                                             │
    │14                                                             │
    └───────────────────────────────────────────────────────────┘

23 Produce categories........LO EO PL PY VN LE BF




'S' to search
F11=Other
```

How to set up an auto-substitution or prevent substitutions of a product

Go to the Customer Master Maintenance page and bring up the customer.

Hit ".". And then go to Exceptions.

Go to More Information, Product

```
                    EXCEPTIONS

Exclusions by:
      Product code
      Class
      Commodity
      Department
      Product selection code
      Lot-related
Inclusions by:
      Product code
      Class
      Commodity
      Department
      Product selection code
      Lot-related
Proprietary items
      Product
      Department
More Information by:
      Product
      Commodity
```

If there are currently auto-subs in place for this customer, this screen will appear.

Hit enter to select any product.

```
Customer code index          CG Louisville              CPXENT2
                        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...
   ─More Information──────────────────────────────────────────────
       Product code..........TEST        CREATE YOUR PROFILE FROM WEB DELETE

    5   1 Picking labels override..............
    6   2 Label multiple override..............1
    7   3 Default repack labels................
    8
    9   4 Shelf life...........................
   10   5 Shelf life after delivery............
   11
   12   6 Case/pallet..........................
   13   7 Ignore Price Product setting?........
   14   8 Primary vendor.......................
        9 End user group code..................
   23



Select: █___   Add  Config  Modify  Page  Quit  Stamp  Substitute  View      >
```

Hit "A" for Add

```
Select: █___    Add   Config  Modify  Page  Quit  Stamp  Substitute  View        >
```

For this example, we will say that anytime this customer is shorted Thai Basil, they would like to have regular basil. In this screen, hit "s" to search for Basil.

```
─More Information──────────────────────────────────
   Product code..........█
 
 1 Picking labels override..............
 2 Label multiple override..............
 3 Default repack labels................
 
 4 Shelf life...........................
 5 Shelf life after delivery............
 
 6 Case/pallet..........................
 7 Ignore Price Product setting?........
 8 Primary vendor.......................
 9 End user group code..................
```

```
Customer code index            CG Louisville                    PMSRCH
                        Customer Master Maintenance
*NOTE*
    Customer code.......TEST      1 Name........TEST CUSTOMER AND USER
    Redbook pin number...         2 Second name..
 ┌Product Search──────────────────────────────────────────────────────┐
 │  PROD #│        DESCRIPTION        │ON HAND│COMMIT│  AVAIL│ EXPECT │ │
 │                                                                       │
 │  1                                                                    │
 │  2        ┌──────────────────────────────────────────┐               │
 │  3        │          Enter search fields             │               │
 │  4        │                                          │               │
 │  5        │  Long description..basil                 │               │
 │  6        │  Packaging........█                      │               │
 │  7        │                                          │               │
 │  8        │     At least 3 consecutive non-blank chars│               │
 │  9        └──────────────────────────────────────────┘               │
 │ 10                                                                    │
 │ 11                                                                    │
 │ 12                                                                    │
 │ 13                                                                    │
 │ 14                                                                    │
 │ 15                                                                    │
 │                                                                       │
 └───────────────────────────────────────────────────────────────────┘
```

Then select Thai Basil

```
Customer code index            CG Louisville                    PMSRCH
                        Customer Master Maintenance
*NOTE*
    Customer code........TEST     1 Name........TEST CUSTOMER AND USER
    Redbook pin number...         2 Second name..
 ┌Product Search──────────────────────────────────────────────────────┐
 │  PROD #│        DESCRIPTION        │ON HAND│COMMIT│  AVAIL│ EXPECT │ │
 │                                                                       │
 │  1 40001  HERB - BASIL - FRESH 00275    1 LB   747    30    717     0 │
 │  2 40030  HERB - THAI BASIL - FRESH       LB    16     0     16     0 │
 │  3 97009  SPICE - BASIL DRIED LARGE LG 24 OZ     4     0      4    20 │
 │  4 97010  SPICE - BASIL DRIED       5 OZ TUB     4     0      4     0 │
 │  5 40411  8 OZ MICRO BASIL MIX      8 OZ PACK    0     1     -1    12 │
 │  6 91139  LOCAL KENNYS TOM BASIL CHEDDAR  LB  7.45     0   7.45     0 │
 │  7 40037  *1/4 LB*BASIL - FRESH -  1/4 POUND   107     6    101     0 │
 │  8 40414  CRYSTAL - BASIL           4 OZ JAR    11     0     11     0 │
 │  9 91808  BRUDER BASIL             3LB LOAF     20     0     20     0 │
 │ 10 91897  LOCAL KENNYS TOM BASIL C 5LB BLOCK    15     0     15    20 │
 │ 11 03288  PIZZA SAUCE WITH BASIL    6/#10 CS     8     0      8     0 │
 │ 12 07723  PESTO SAUCE W/BASIL ARM 6/30 OZ CS     7     0      7     0 │
 │ 13 26056  PIZZA SAUCE - WITH BASIL   #10 CAN     5     0      5     0 │
 │ 14 98822  SPICE - BASIL DRIED       6 CT CS      1     0      1     5 │
 │ 15 02052  4 OZ MICRO BASIL ITALIAN 4 OZ PACK     0     0      0     0 │
 │    40030  HERBTHAI                                                    │
 PRICE :    12.0267 - COMP FILE FORMULA          Market   : 8.4187
Select: │___   Chg_layout Colors Config Days Exceptions Info Lead Lot Quit Search
               Select Show Specord View                                >
```

Enter through the fields on the first page.

```
Customer code index          CG Louisville                  CPXENT2
                       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...
  ┌─More Information────────────────────────────────────────────────┐
  │   Product code..........HERBTHAI      HERB - THAI BASIL - FRESH  │
  │                                                                  │
 5│  1 Picking labels override.............█                         │
 6│  2 Label multiple override.............                          │
 7│  3 Default repack labels...............                          │
 8│                                                                  │
 9│  4 Shelf life..........................                          │
10│  5 Shelf life after delivery...........                          │
11│                                                                  │
12│  6 Case/pallet.........................                          │
13│  7 Ignore Price Product setting?.......                          │
14│  8 Primary vendor......................                          │
  │  9 End user group code.................                          │
23│                                                                  │
  └──────────────────────────────────────────────────────────────────┘

  (U)nit  (L)ine  (C)ase equivalence  (N)o  ()blank
```

If this customer **never** wanted a substitute on this product, you can put a "Y" in line 1 Prohibit Substitutions.

```
Customer code index          CG Louisville                  CPXENT2
                       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...
 ┌─More product information─────────────────────────────────────────┐
 │   Product code........HERBTHAI      HERB - THAI BASIL - FRESH  LB │
 │                                                                  │
 │  1 Picking labels override..............                         │
 │  2 Label multiple override..............1                        │
 │  3 Override picking label code...........                        │
 │  4 Default repack labels.................                        │
 │                                                                  │
 │  5 Case/pallet...........................                        │
 │  6 Override case weight..................     .00                │
 │                                                                  │
 │  7 Shelf life............................                        │
 │  8 Shelf life after delivery.............                        │
 │                                                                  │
 │  9 Prohibit substitutions?..............█                        │
 │ 10 Start/end date.......................                         │
 └──────────────────────────────────────────────────────────────────┘
 (Y)es  (N)o  ()default
```

For this instance, however, the customer would like the Thai Basil to be auto-subbed. Continue hitting enter to get back to the first page.

Then hit "S" for Substitute.

```
Customer code index          CG Louisville                    CPXENT2
                      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...
   ─More Information─
      Product code..........HERBTHAI      HERB - THAI BASIL - FRESH

   5  1 Picking labels override..............
   6  2 Label multiple override..............1
   7  3 Default repack labels...............
   8
   9  4 Shelf life.........................
  10  5 Shelf life after delivery...........
  11
  12  6 Case/pallet.........................
  13  7 Ignore Price Product setting?........
  14  8 Primary vendor......................
      9 End user group code.................
  23



Select: ▌          Add  Config  Modify  Page  Quit  Stamp  Substitute  View     >
```

Hit enter

```
Customer code index          CG Louisville                    PSBMNT
                      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...
   ─More Information─
      Product code..........HERBTHAI      HERB - THAI BASIL - FRESH
   ─HERBTHAI - HERB - THAI BASIL - FRESH LB─
   5  │ SUBST PROD │      PRODUCT DESCRIPTION      │EXCL│ RATIO │
   6  │▌          │                               │    │  1.00 │
   7  │
   8  │
   9  │
  10  │
  11  │
  12  │
  13  │
  14  │

  23


'S' to search
F11=Other
```

Hit "S" enter to search for the product.

Select the product you want to be auto-subbed.

```
Customer code index          CG Louisville              ▌ PMSRCH
                    Customer Master Maintenance
*NOTE*
    Customer code.......TEST      1 Name........TEST CUSTOMER AND USER
    Redbook pin number...         2 Second name..
┌Product Search──────────────────────────────────────────────────────┐
│  │PROD #│        DESCRIPTION       │ON HAND│COMMIT│  AVAIL│ EXPECT│  │
│  │      │                          │       │      │       │       │  │
│ 1│40001 │HERB - BASIL - FRESH 00275    1 LB│  746 │   29 │   717 │    0│
│ 2│40030 │HERB - THAI BASIL - FRESH     LB  │   16 │    0 │    16 │    0│
│ 3│97009 │SPICE - BASIL DRIED LARGE LG 24 OZ│    4 │    0 │     4 │   20│
│ 4│97010 │SPICE - BASIL DRIED       5 OZ TUB │    4 │    0 │     4 │    0│
│ 5│40411 │8 OZ MICRO BASIL MIX      8 OZ PACK│    0 │    1 │    -1 │   12│
│ 6│91139 │LOCAL KENNYS TOM BASIL CHEDDAR  LB │ 7.45 │    0 │  7.45 │    0│
│ 7│40037 │*1/4 LB*BASIL - FRESH -  1/4 POUND │  107 │    6 │   101 │    0│
│ 8│40414 │CRYSTAL - BASIL           4 OZ JAR │   11 │    0 │    11 │    0│
│ 9│91808 │BRUDER BASIL              3LB LOAF │   20 │    0 │    20 │    0│
│10│91897 │LOCAL KENNYS TOM BASIL C 5LB BLOCK │   15 │    0 │    15 │   20│
│11│03288 │PIZZA SAUCE WITH BASIL    6/#10 CS │    8 │    0 │     8 │    0│
│12│07723 │PESTO SAUCE W/BASIL ARM 6/30 OZ CS │    7 │    0 │     7 │    0│
│13│26056 │PIZZA SAUCE - WITH BASIL    #10 CAN│    5 │    0 │     5 │    0│
│14│98822 │SPICE - BASIL DRIED       6 CT CS  │    1 │    0 │     1 │    5│
│15│02052 │4 OZ MICRO BASIL ITALIAN 4 OZ PACK│    0 │    0 │     0 │    0│
│  │40001 │HERBBASIL                         │      │      │       │     │
PRICE :    6.9280 - COMP FILE FORMULA            Market   : 4.8496
Select: █___    Chg_layout Colors Config Days Exceptions Info Lead Lot Quit Search
                Select Show Specord View                                >
```

You can modify the ratio if needed. This product is 1 pound of basil, which would be equivalent to 1 pound of Thai Basil. However, you may want to set up an auto-sub of two items that are not of like pack size. In that instance you may need to adjust the ratio. (ex. Subbing 2 – 10# cases of something for 1 – 20# case). Once you have entered through to the next line.

```
Customer code index          CG Louisville              PSBMNT
                    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...
  ┌─More Information─────────────────────────────────────────────┐
  │     Product code..........HERBTHAI     HERB - THAI BASIL - FRESH
  │ ┌─HERBTHAI - HERB - THAI BASIL - FRESH LB──────────────────┐
  │5│  SUBST PROD  │     PRODUCT DESCRIPTION     │EXCL│ RATIO │
  │6│HERBBASIL     │HERB - BASIL - FRESH 00275   1 LB│     1.00│
  │7│█             │
  │8│
  │9│
  │10│
  │11│
  │12│
  │13│
  │14│
  │
  │23│
  │
  │
  │
  └──────────────────────────────────────────────────────────┘
'S' to search
F11=Other
```

You can then hit escape 4 times to get back to the Customer Master Maintenance page. Now the Test customer will always receive Basil in the event the Thai Basil is shorted.

How to print a Price List

After entering Produce Pro, go to 8 – Pricing → 1 Prices Print

There are many options to choose from.

In many instances, customers will want their profile price list. There are several options.

PROFILE PRINT IN 2 COL W/ PRIC will print a price list of items on the customer's profile.

```
                           CG Louisville                   PD370
                            Prices Print
  1 P
  2 R            Select Configuration to Load
  3 O ┌────────────────────PGUP──────────────────────────────┐
      │ KABOBS     : KABOBS APPETIZERS       0001(0 assigned) │
  4 P │ KENWOOD    : KENWOOD EXCEL PROFILE PRINT  0001(0 assigned) │
  5 C │ MRE_PPRO   : MATT ERWIN              0001(0 assigned) │
  6 P │ MTL_PPRO   : MICHAEL LY              0001(0 assigned) │
  7 C │ NON-FOOD   : NON-FOOD PRODUCTS       0001(0 assigned) │
  8 I │ ORDER GUID : ORDER GUIDE PRINT       0001(0 assigned) │
  9 R │ ORDER-LIST : ORDER GUIDE LIST (ORD COLS)  0001(0 assigned) │
 10 C │ ORDER-SIMP : ORDER GUIDE PROFILE (ORD COLS) 0001(0 assigned) │
 11 C │ PRICE_LIST : PRICE LIST PRINT        0001(0 assigned) │
      │ PROFILE_PL : PROFILE PRINT IN 2 COL W/ PRIC 0001(0 assigned) │
 12 P │ RALPHTEST  : RALPH TEST CONFIG       0001(0 assigned) │
 13 P │ RUTH CHRIS : RUTH CHRIS NASH FRIDAY PRICING 0001(0 assigned) │
 14 P │ SACRDBEAST : EXCEL SACRED BEAST      0001(0 assigned) │
 15 P │ SEA-AVENDR : SEAFOOD AVENDRA PRICELIST  0001(0 assigned) │
 16 P │ STAPLES-CS : CHANELS STAPLES LIST    0001(0 assigned) │
 17 A └────────────────────PGDN──────────────────────────────┘
      │ Use (F3) for all configs, (?) for assigned, (space) to search │
      └──────────────────────────────────────────────────────┘
```

On Line 5, enter the customer.

```
Cfg=PROFILE_PL Modified        CG Louisville                   PD370
                                Prices Print

  1 Printer.............................EMAIL
  2 Report title...........................
  3 Override copies per customer............    1

  4 Price list print template code..........2Q 2 COLUMN PROFILE PRICES W/PROD
  5 Customer..............................TEST TEST CUSTOMER AND USER
  6 Profile tag............................
  7 Customer categories....................
  8 Include/exclude categories.............I
  9 Retail zones...........................
 10 Customers on selected list(s) only?......P
 11 Customers on call list only?............N

 12 Print lists by route / date?............N
 13 Price list category....................
 14 Price lists to print...................
 15 Print profile if defined by template?....Y
 16 Pricing / expiration dates.............
 17 Ad order date..........................

Select: ▌___   Config  Go  Layout  Modify  Page  Quit  Recur  Schedule
```

Hit G for Go.

```
Cfg=PROFILE_PL Modified          CG Louisville                    PD370
                              Prices Print

  1 Printer.................................EMAIL
  2 Report title............................
  3 Override copies per customer............    1

  4 Price list print template code...........2Q 2 COLUMN PROFILE PRICES W/PROD
  5 Customer................................TEST TEST CUSTOMER AND USER
  6 Profile tag.............................
  7 Customer categories.....................
  8 Include/exclude categories..............I
  9 Retail zones............................
 10 Customers on selected list(s) only?......P
 11 Customers on call list only?.............N

 12 Print lists by route / date?.............N
 13 Price list category.....................
 14 Price lists to print....................
 15 Print profile if defined by template?....Y
 16 Pricing / expiration dates..............
 17 Ad order date...........................


Select: ▓___   Config  GO  Layout  Modify  Page  Quit  Recur  Schedule
```

Enter the email address to send the profile to.

```
Cfg=PROFILE_PL Modified          CG Louisville                    PD370
                              Prices Print

  1 Printer.................................EMAIL
 ┌──────────────────────────────────────────────────────────────┐
 │                  Enter Email Destination                       │
 ├──────────────────────────────────────────────────────────────┤
 │   Mail Address..▓                                              │
 │   Subject.......                                               │
 │   Comment.......                                               │
 │                                                                │
 │                                                                │
 │                                                                │
 │                                                                │
 11└──────────────────────────────────────────────────────────────┘

 12 Print lists by route / date?.............N
 13 Price list category.....................
 14 Price lists to print....................
 15 Print profile if defined by template?....Y
 16 Pricing / expiration dates..............
 17 Ad order date...........................

Select: (O)perator, (B)ook, (G)roup, (M)aintain, or (C)lear
```

This is what the report looks like.

Prod	Product Description	Price	Prod	Product Description	Price
20017	CAULIFLOWER - MIXED COLOR 6 CT CS	43.95			
10300	BANANAS - PREMIUM 40 LB CS	26.95			
10200	APPLE - RED DELICIOUS 88 CT CS	33.95			
40315	CILANTRO - MICRO 4 OZ PACK	16.55			
50902	TOMATO - HEIRLOOM CHERRY MIX PINT	4.20			
50014	TOMATO - HEIRLOOM 10 LB CS	39.00			
10211	APPLE - BABY MIXED 10 LB CS	37.95			
10235	APPLE - HONEY CRISP CS	55.95			
96505	GLUCOSE SYRUP 11 LB TUB	31.60			
90554	MILK - SWEETENED CONDENSED EA 14 OZ CAN	3.55			
96638	CALLEBAUT - WHITE CALLET 28% 5.5 LB BAG	39.50			
93314	FLOUR - WHITE RICE LB	1.75			
98394	PRO-KAL DELI CONTAINER 8oz FABRI-KAL 500 CT	51.20			
48077	SALMON - FLT 4+LB ATL CHILE LB	7.99			
00984	ELK - GROUND FZ 10 LB CS	81.95			
00336	BEEF - BRISKET BLACK HAWK EACH 18 LB AVG	4.95			
48575	OYSTERS - CHESAPEAKE BEST USA MED 30 LB	66.99			

Creation Gardens
Prices For -
TEST CUSTOMER AND USER
Page 1 of 1
Date:

What Chefs Want!

Another useful list to print is ORDER GUIDE PRINT.

```
1 P
2 R                     Select Configuration to Load
3 O──────────────────────────PGUP──────────────────────────
    KABOBS     : KABOBS APPETIZERS          0001(0 assigned)
4 P KENWOOD    : KENWOOD EXCEL PROFILE PRINT 0001(0 assigned)
5 O MRE_PPRO   : MATT ERWIN                 0001(0 assigned)
6 P MTL_PPRO   : MICHAEL LY                 0001(0 assigned)
7 O NON-FOOD   : NON-FOOD PRODUCTS          0001(0 assigned)
8 I ORDER GUID : ORDER GUIDE PRINT          0001(0 assigned)
9 R ORDER-LIST : ORDER GUIDE LIST (ORD COLS) 0001(0 assigned)
10 C ORDER-SIMP : ORDER GUIDE PROFILE (ORD COLS) 0001(0 assigned)
11 C PRICE_LIST : PRICE LIST PRINT          0001(0 assigned)
    PROFILE_PL : PROFILE PRINT IN 2 COL W/ PRIC 0001(0 assigned)
12 P RALPHTEST  : RALPH TEST CONFIG          0001(0 assigned)
13 P RUTH CHRIS : RUTH CHRIS NASH FRIDAY PRICING 0001(0 assigned)
14 P SACRDBEAST : EXCEL SACRED BEAST         0001(0 assigned)
15 P SEA-AVENDR : SEAFOOD AVENDRA PRICELIST  0001(0 assigned)
16 P STAPLES-CS : CHANELS STAPLES LIST       0001(0 assigned)
17 A──────────────────────────PGDN──────────────────────────
    Use (F3) for all configs, (?) for assigned, (space) to search
```

This report is helpful to the customers to use as an order guide.

Creation Gardens
Order Guide
TEST CUSTOMER AND USER

Page 1 of 1
Date:

Creation Gardens
What Chefs Want!

*** When calling in orders, please let us know you are using the order guide and go in order from the top. Thank you ! ***

Product Description	Mon		Tue		Wed		Thu		Fri		Sat		Sun	
	OH	ORD	OH	ORD	OH	ORD	OH	ORD	OH	ORD	OH	ORD	OH	ORD
CAULIFLOWER - MIXED COLOR 6 CT CS														
BANANAS - PREMIUM 40 LB CS														
APPLE - RED DELICIOUS 88 CT CS														
CILANTRO - MICRO 4 OZ PACK														
TOMATO - HEIRLOOM CHERRY MIX PINT														
TOMATO - HEIRLOOM 10 LB CS														
APPLE - BABY MIXED 10 LB CS														
APPLE - HONEY CRISP CS														
GLUCOSE SYRUP 11 LB TUB														
MILK - SWEETENED CONDENSED EA 14 OZ CAN														
CALLEBAUT - WHITE CALLET 28% 5.5 LB BAG														
FLOUR - WHITE RICE LB														
PRO-KAL DELI CONTAINER 8oz FABRI-KAL 500 CT														
SALMON - FLT 4+LB ATL CHILE LB														

There are many more price lists. Ask a co-worker if you are trying to find a particular price list.

How to look up a price for a customer

From any screen, hit F9, then arrow down to Customer Pricing.

```
 Produce Pro  |  0001  |  CG Louisville                        PDMENUPR

              ┌──────────────────────────────────────────┐
              │                HOT KEYS                   │
        Produce│                                          │
              │  Adjustments (Credits)                    │
   1 Purchasing,│ Bulletin Board                          │
   2 A/P interfa│ Calculator                              │
   3 Sales      │ Calendar                                │
   4 Shipping   │ Collections (A/R)                       │
   5 Routing    │ Container inventory                     │
   6 A/R interfa│ Customer Ads                            │
   7 Inventory  │ Customer Information                    │
   8 Pricing    │ Customer Pricing                        │
   9 Document ex │ Customer Pricing History               │
  10 Master file │ Customer Pricing Inquiry      <F6>      │
  11 Sales analy │ Customer Sales Transactions            │
  12 Brokerage e │ Customer Search                        │
  13 Grower oper │ Customer master                        │
  14 Work orders │ Email                         <F4>     │
  15 Utilities   │                                        │
  16 Food safety │            ─PGDN─                       │
  17 Change ware │ 11 Pricing reports                     │
              └──────────────────────────────────────────┘
```

Enter the customer and the product.

```
 Produce Pro  |  0001  |  CG Louisville                        PRICINQ

 ┌─Product Prices──────────────────────────────────────────────────┐
 │  DESCRIPTION                        PRICE  PRICE SOURCE      FM   │
 │                                                                  │
 │ 1                                                                │
 │ 2                                                                │
 │ 3                                                                │
 │ 4                                                                │
 │ 5                                                                │
 │ 6                                                                │
 │ 7                                                                │
 │ 8                                                                │
 │ 9                                                                │
 │10                                                                │
 │11  ┌──────────────────────────────┐                             │
 │12  │ CUSTOMER......TEST            │                             │
 │13  │ PRICING DATE..06/10/19        │                             │
 │14  │ WAREHOUSE.....CG              │                             │
 │15  │ PRODUCT.......99016           │                             │
 │16  └──────────────────────────────┘                             │
 │17                                                                │
 └──────────────────────────────────────────────────────────────────┘
```
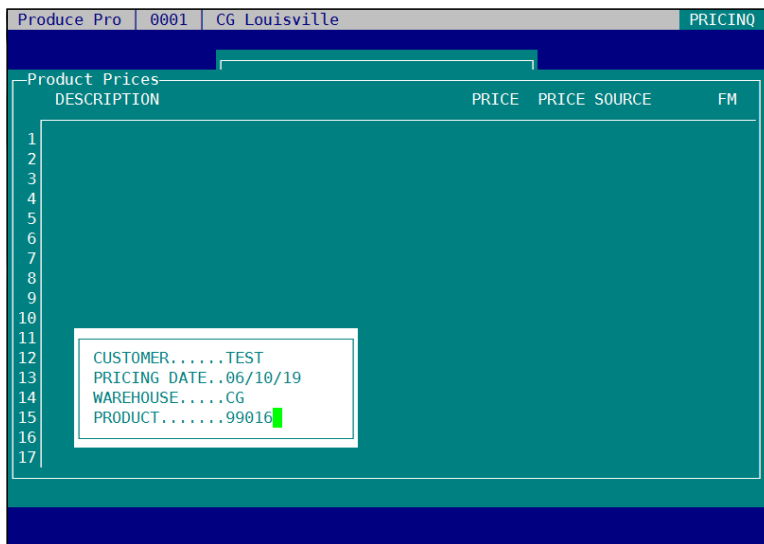
Hit enter.

```
Produce Pro  | 0001 | CG Louisville                              PRICINQ

┌─Product Prices──────TEST - TEST CUSTOMER AND USER
    DESCRIPTION                            PRICE  PRICE SOURCE       FM

  1 │ ECO BOWL-8 OZ PAPER SOUP/FOOD    1000 CT   88.15  PRICE LIST 6      CO
  2 │ ECO BOWL - 6 OZ FIBER BARREL     1000 CT   67.35  PRICE LIST 6      CO
  3 │ ECO BOWL - BURRITO FIBER      300CT CASE   51.70  PRICE LIST 6      CO
  4 │ CARRIER - 4 CUP PAPER W/HANDLE 250 CT CS  100.80  PRICE LIST 6      CO
  5 │ ECO CLAMSHELL-HOAGIE9X5X3FIBER 500 CT CS   87.55  PRICE LIST 6      CO
  6 │ TEA - RISHI CHAI LIQUID CONCEN  12/32 OZ   87.45  PRICE LIST 7      CO
  7 │ CHARGER - C02 10 PACK          10CT PACK    8.35  PRICE LIST 6      CO
  8 │ CHARGER - WHIPPED CREAM ISI     50 CT/EA   37.95  PRICE LIST 6      CO
  9 │ CHAFING FUEL- 2HR BLAZE G-B100  72 CT CS   50.60  PRICE LIST 6      CO
 10 │ CHAFING FUEL- 4HR L-B700        24 CT CS   39.00  PRICE LIST 6      CO
 11 │ CHAFING FUEL- 6HR WICKED LB300  24 CT CS   42.40  PRICE LIST 6      CO
 12 │ ESPR MACH CLNR 100 TABLET JAR  12CT CASE  189.90  PRICE LIST 6      CO
 13 │ CAFIZA ESPRESSO CLEANER 20oz     12/20oz   99.00  PRICE LIST 6      CO
 14 │ GRINDZ GRINDER CLEANER COFFEE 15.2oz JAR   24.70  PRICE LIST 6      CO
 15 │ COFFEE FILTER - 1.5 GAL BUNN   500 CT CS   16.15  PRICE LIST 6      CO
 16 │ URNEX ORIGINAL CLEANER COFFEE 100/1oz CS   21.85  PRICE LIST 6      CO
 17 │ ECO CUP - COLD 12 OZ PLA CLEAR   1000 CT   92.95  PRICE LIST 6      CO
└─99016-ECOBOPA8     ▪FMLA: CO-cost
  CG Louisville
Select: ▮___   Addprof Adonly Ad_search Config Formulas History Inquiry Level
            Print Product Profile Quit Select Srp Trace Warehouse
```
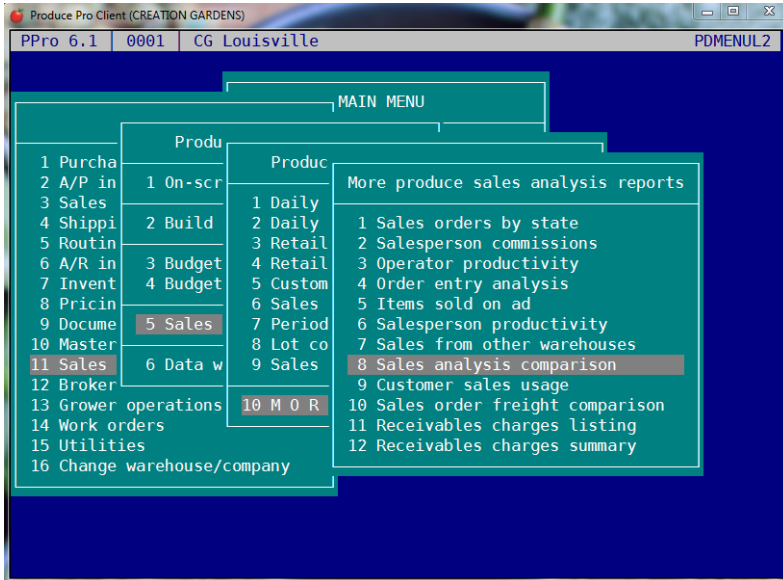
If you need to look up an additional product, arrow to Product to enter another product.

How To Run A 5 Month Trend Report

After entering Produce Pro, go to 11 → Sales Analysis → 5 Sales analysis reports → 10 MORE → 8 Sales analysis comparison.

Go to CUST TRE 2 : CUSTOMER MO TREND 2
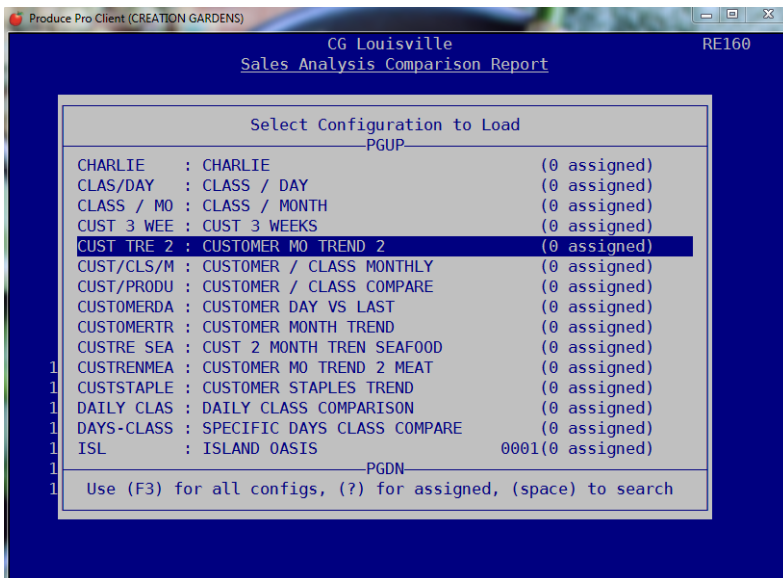
Enter the Customer Category(ies). For this example, I used ID for Indianapolis.
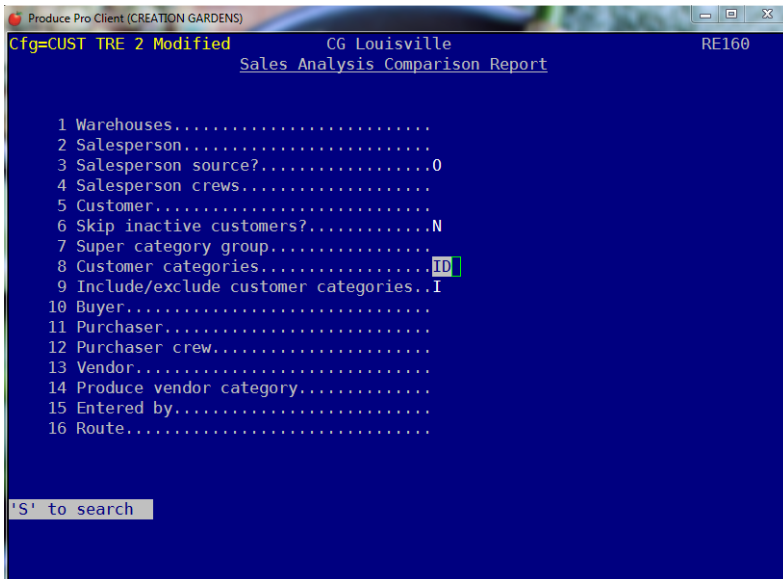
That will bring you to this screen:
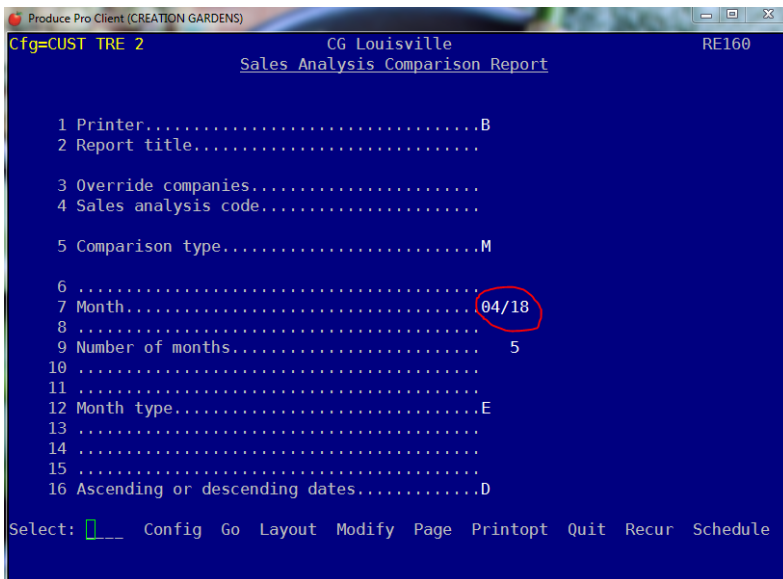
If you are running this report at the end of a month, leave the month on line 7 the same. If you are running this at the start of a new month and you want to see the months prior, change the month to the prior month. For example, if I am running this report on May 1, 2018, I would not want May's numbers included since there will be very little. Change the month to the month prior (in this case 04/18).

On line 1, select the printer you would like to use. Enter "1" go get to line 1 and then "s" enter to search for available printers. Once on the printer screen, you can start typing a printer name to jump to it or use the arrow keys to find the desired printer.

```
Cfg=WEEKLY CAL               CG Louisville                    RP440
                       Customer Buying Patterns

   1 Printer...........................s
   2 Primary layout code.................STANDARD

   3 Report t┌──────── Select Printer (Company 0001 printers only) ────────┐
   4 Start/en│ B          BROWSE                                          │
            │ BFINV1                                                     │
   5 Customer│ BFINV2     BLUEFIN CUT SHEET PRINTER                      │
   6 Salesper│ BFREC      BFRec                                          │
   7 Salesper│ BFREPORT                                                  │
   8 Warehous│ BFZEB2                                                    │
   9 Customer│ BKUPINVOIC Backup invoice (2 copies from broken pick)     │
  10 Include/│ BP         BROWSE (PDF)                                   │
  11 Product │ BPL        Browse PDF Landscape                           │
  12 Include/│ BROKENPICK Broken pick printer                           │
  13 Product │ BROK_PICK  BROKEN PICK TICKET                            │
            │ BROWSE2     BROWSE                                         │
            │                          ─PGDN─                           │
            │ Press F3 to show all printers                             │
            └───────────────────────────────────────────────────────────┘
```
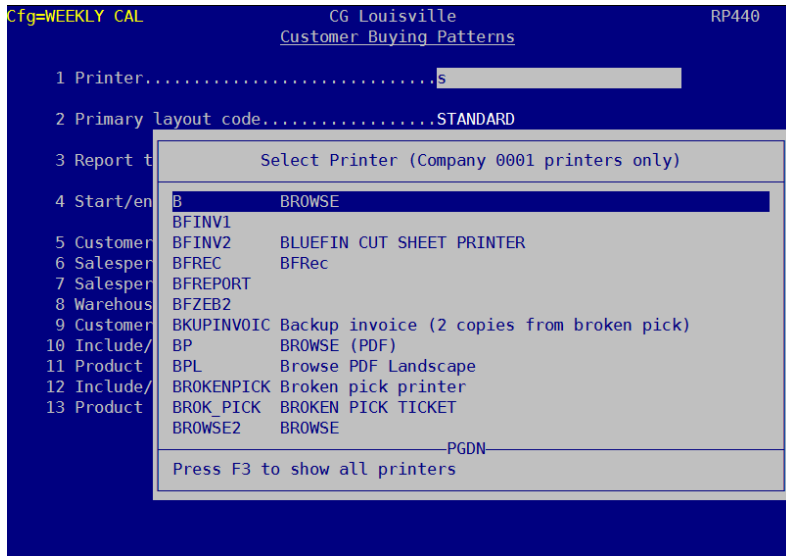
B – Browse (report will open up in Ppro)

EMAIL – report will be emailed to you in pdf form

Or you can choose the printer in your region and print directly. Be aware that these reports are quite long for some regions and you may want to default to emailing them to yourself.
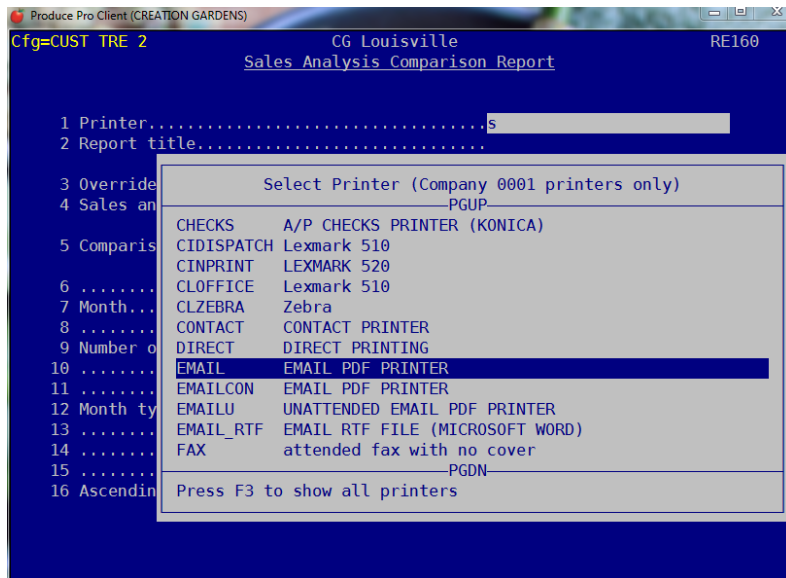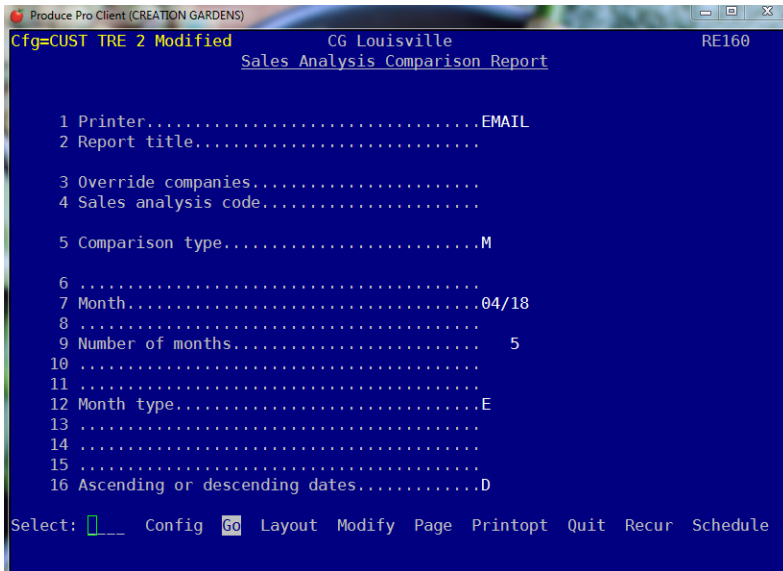
```
 Produce Pro Client (CREATION GARDENS)                          _ □ X
Cfg=CUST TRE 2               CG Louisville                    RE160
                     Sales Analysis Comparison Report


   1 Printer................................s
   2 Report title..........................

   3 Override┌──────── Select Printer (Company 0001 printers only) ────────┐
   4 Sales an│                          ─PGUP─                           │
            │ CHECKS     A/P CHECKS PRINTER (KONICA)                     │
   5 Comparis│ CIDISPATCH Lexmark 510                                    │
            │ CINPRINT   LEXMARK 520                                     │
   6 .......│ CLOFFICE   Lexmark 510                                    │
   7 Month...│ CLZEBRA    Zebra                                          │
   8 ........│ CONTACT    CONTACT PRINTER                                │
   9 Number o│ DIRECT     DIRECT PRINTING                                │
  10 ........│ EMAIL      EMAIL PDF PRINTER                              │
  11 ........│ EMAILCON   EMAIL PDF PRINTER                              │
  12 Month ty│ EMAILU     UNATTENDED EMAIL PDF PRINTER                   │
  13 ........│ EMAIL_RTF  EMAIL RTF FILE (MICROSOFT WORD)                │
  14 ........│ FAX        attended fax with no cover                     │
  15 .......│                          ─PGDN─                           │
  16 Ascendin│ Press F3 to show all printers                            │
            └───────────────────────────────────────────────────────────┘
```

Hit "G" for Go:

Then enter your email address and a subject.
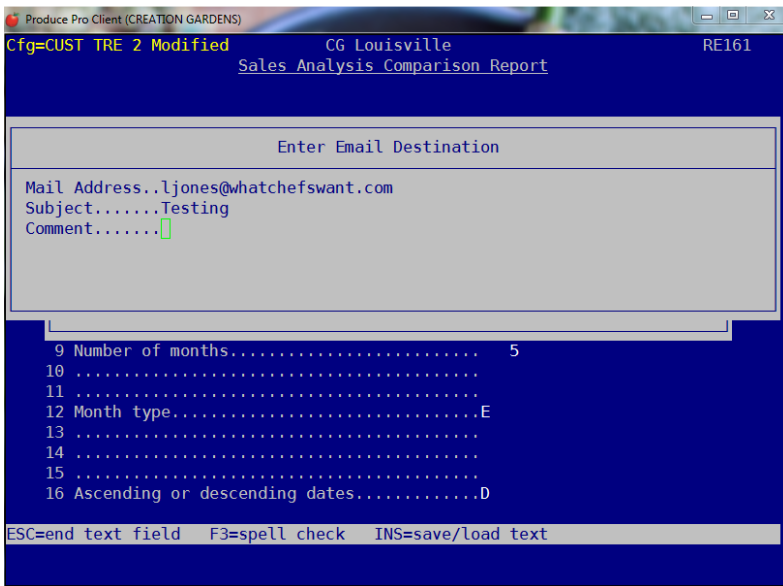
Continue hitting enter and the report will come to your email.

How To Run 5 month trend report by department

This report will show customers' buying habits across each line of product for the last 5 months

```
Produce Pro | 0001 | CG Louisville                        PDMENUL2
                            ┌─────────────────────────┐
                            │                  AIN MENU│
                ┌──────Produ┤                  ┬       │
      1 Purcha  │           │        ┌─────Produc─────────────────────────────┐
      2 A/P in  │ 1 On-scr  │        │         More produce sales analysis reports │
      3 Sales   │           │ 1 Daily│                                          │
      4 Shippi  │ 2 Build   │ 2 Daily│ 1 Sales orders by state                  │
      5 Routin  │ 3 Data w  │ 3 Retail│ 2 Salesperson commissions               │
      6 A/R in  │           │ 4 Retail│ 3 Operator productivity                 │
      7 Invent  │ 4 Budget  │ 5 Custom│ 4 Order entry analysis                  │
      8 Pricin  │ 5 Budget  │ 6 Sales │ 5 Items sold on ad                      │
      9 Docume  │ 6 Budget  │ 7 Period│ 6 Salesperson productivity              │
     10 Master  │           │ 8 Lot co│ 7 Sales from other warehouses           │
     11 Sales   │ 7 Sales   │ 9 Sales │ 8 Sales analysis comparison             │
     12 Broker  └───────────┤10 Sales │ 9 Customer sales usage                  │
     13 Grower operations   │         │10 Sales order freight comparison        │
     14 Work orders         │ 11 M O R│11 Receivables charges listing           │
     15 Utilities           └─────────┤12 Receivables charges summary           │
     16 Food safety                   └─────────────────────────────────────────┘
     17 Change warehouse/company (C)
```
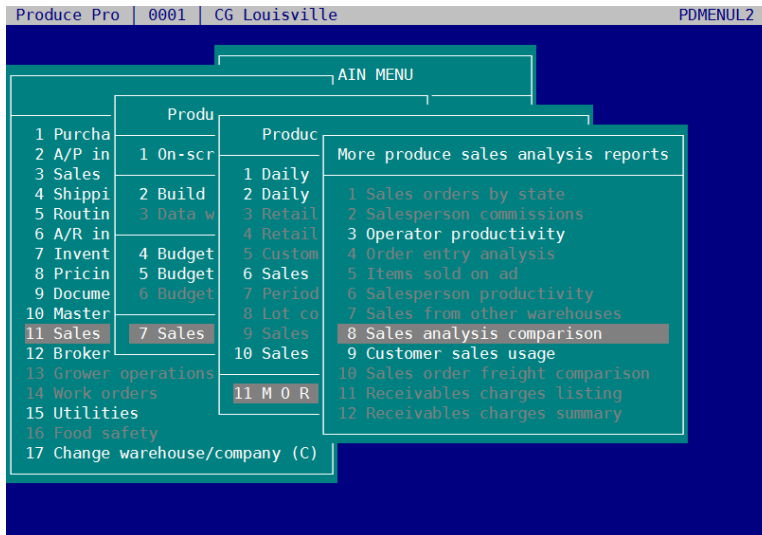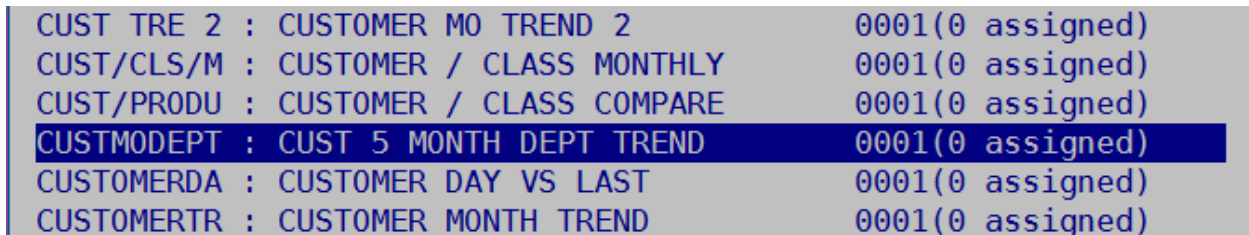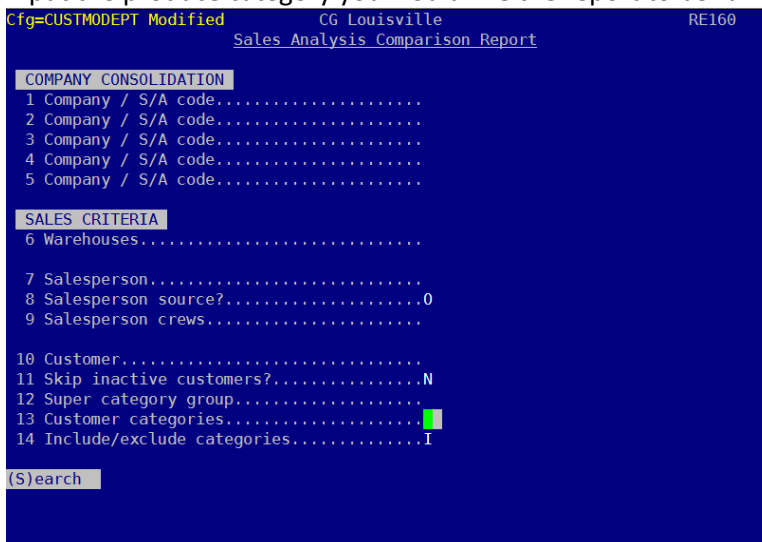
For 5 month trend, choose CUST 5 MONTH DEPT TREND

```
CUST TRE 2 : CUSTOMER MO TREND 2        0001(0 assigned)
CUST/CLS/M : CUSTOMER / CLASS MONTHLY   0001(0 assigned)
CUST/PRODU : CUSTOMER / CLASS COMPARE   0001(0 assigned)
CUSTMODEPT : CUST 5 MONTH DEPT TREND    0001(0 assigned)
CUSTOMERDA : CUSTOMER DAY VS LAST       0001(0 assigned)
CUSTOMERTR : CUSTOMER MONTH TREND       0001(0 assigned)
```

Input the produce category you would like the report to be run.

```
Cfg=CUSTMODEPT Modified         CG Louisville          RE160
                    Sales Analysis Comparison Report

 COMPANY CONSOLIDATION
 1 Company / S/A code.....................
 2 Company / S/A code.....................
 3 Company / S/A code.....................
 4 Company / S/A code.....................
 5 Company / S/A code.....................

 SALES CRITERIA
 6 Warehouses.............................

 7 Salesperson............................
 8 Salesperson source?....................O
 9 Salesperson crews......................

10 Customer...............................
11 Skip inactive customers?...............N
12 Super category group...................
13 Customer categories....................
14 Include/exclude categories.............I

(S)earch
```

If you are running this report on the last day of the month, you do not have to change the month. If you are running this report on any other day of the month, you will need to change the month on line 6 to reflect the previous month.

```
Cfg=CUSTMODEPT Modified           CG Louisville                  RE160
                        Sales Analysis Comparison Report

 1 Printer..........................B
 2 Report title.....................Department 5 Month Trend

 3 Contact type.....................

 4 Comparison type..................M

 5 ................................
 6 Month............................05/19
 7 ................................
 8 Number of months.................    5
 9 ................................
10 ................................
11 Month type.......................E
12 ................................
13 ................................
14 ................................

15 Ascending or descending dates......D


Select: █___   Config  Go  Layout  Modify  Page  Printopt  Quit  Recur  Schedule
```

Pick your printer and hit Go.

Here's a snippet of this report.

```
LYNNETTEJ / RE161                    CG Louisville                          Page
11802793                        Department 5 Month Trend               06/05/
                              CUSTOMER/DEPARTMENT SUMMARY

                          05/01/19      04/01/19      03/01/19      02/01/19      0
                            thru          thru          thru          thru
                          05/31/19      04/30/19      03/31/19      02/28/19      0
========================= ============ ============ ============ ============ ===

PROOF ON MAIN
 PRODUCE
      Sales dollars         18298.82      17178.80      13572.51      10410.98
      Actual margin          6872.77       6684.35       5588.83       4413.90

 MEAT - PROTEINS
      Sales dollars         12614.22      13042.12      12406.90       7619.60
      Actual margin          2607.51       3482.78       2962.49       2357.33

 DAIRY - EGGS - CHEESE
      Sales dollars          9692.56      10394.66       7137.86       4922.08
      Actual margin          2633.40       2734.51       2090.69       1472.15

 SEAFOOD
      Sales dollars          6649.40       5344.32       9278.00       4029.77
      Actual margin          1501.97       1202.91       1930.41        398.85

Bar  Col  Exp  paG  Mrk  Opt  Prt  Qit  Srh  Ttl│ 11802793   │  656 pgs  │  1-81
```

How To Run a Year over Year report by department:

This report will show by customer and department, sales monthly, this year vs. last year.
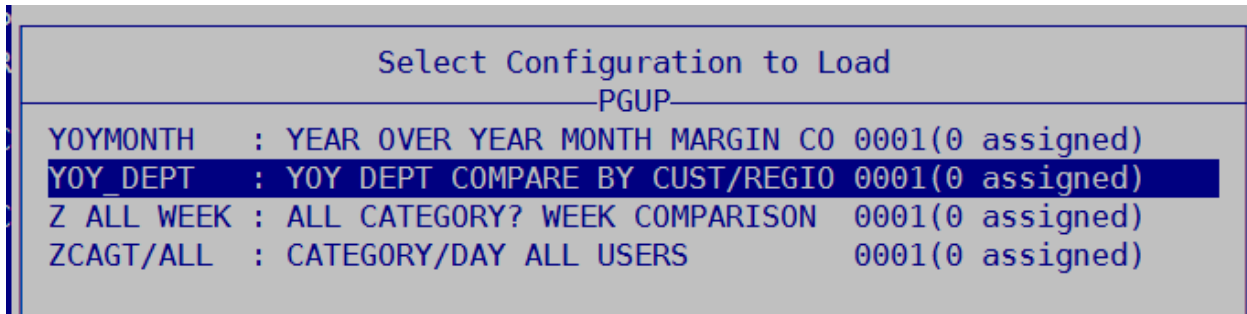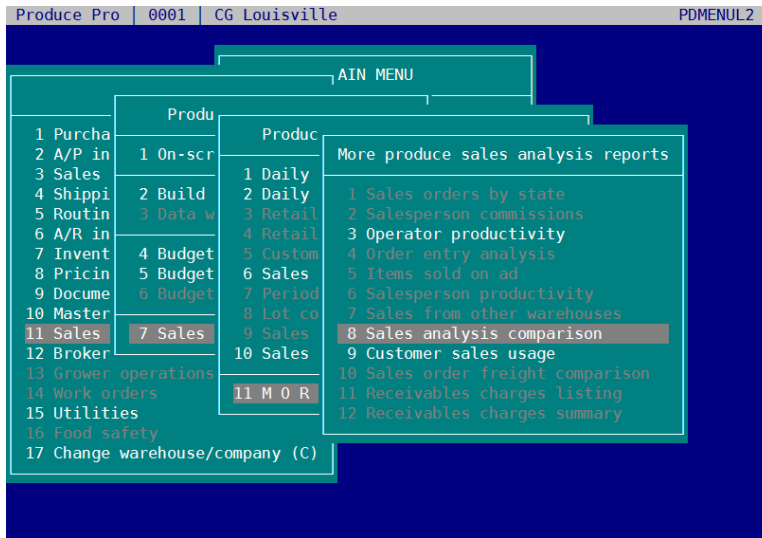
Input the produce category.

                  Sales Analysis Comparison Report

 COMPANY CONSOLIDATION
 1 Company / S/A code......................
 2 Company / S/A code......................
 3 Company / S/A code......................
 4 Company / S/A code......................
 5 Company / S/A code......................

 SALES CRITERIA
 6 Warehouses..............................

 7 Salesperson.............................
 8 Salesperson source?....................O
 9 Salesperson crews......................

10 Customer................................
11 Skip inactive customers?...............N
12 Super category group....................
13 Customer categories....................lo
14 Include/exclude categories.............I

(S)earch

Input the date range on line 5. For example, if you want this report to show this May vs. May 2018, input the date range 05/01/19 and 05/31/19

```
Cfg=YOY_DEPT   Modified         CG Louisville                        RE160
                     Sales Analysis Comparison Report

  1 Printer..........................B
  2 Report title.....................Department YoY Comparison

  3 Contact type.....................

  4 Comparison type..................Y

  5 Date range.......................05/01/19  05/31/19
  6 ................................
  7 ................................
  8 Number of years..................    2
  9 ................................
 10 ................................
 11 ................................
 12 ................................
 13 ................................
 14 Set previous year dates by matchingC

 15 Ascending or descending dates......D


Select: █___   Config  Go  Layout  Modify  Page  Printopt  Quit  Recur  Schedule
```

Select your printer and hit Go.

Here is a snippet of this report.

```
                         05/01/19     05/01/18
                           thru         thru          NET          NET
                         05/31/19     05/31/18       CHANGE       CHG %
========================= ============ ============ ============= =======


PROOF ON MAIN
 PRODUCE
    Sales dollars         18298.82     15381.89      2916.93      18.96
    Actual margin          6872.77      4957.96      1914.81      38.62

 MEAT - PROTEINS
    Sales dollars         12614.22     15354.01     -2739.79     -17.84
    Actual margin          2607.51      3944.44     -1336.93     -33.89

 DAIRY - EGGS - CHEESE
    Sales dollars          9692.56      8485.71      1206.85      14.22
    Actual margin          2633.40      2423.85       209.55       8.65

 SEAFOOD
    Sales dollars          6649.40      6557.04        92.36       1.41
    Actual margin          1501.97      1173.59       328.38      27.98
```

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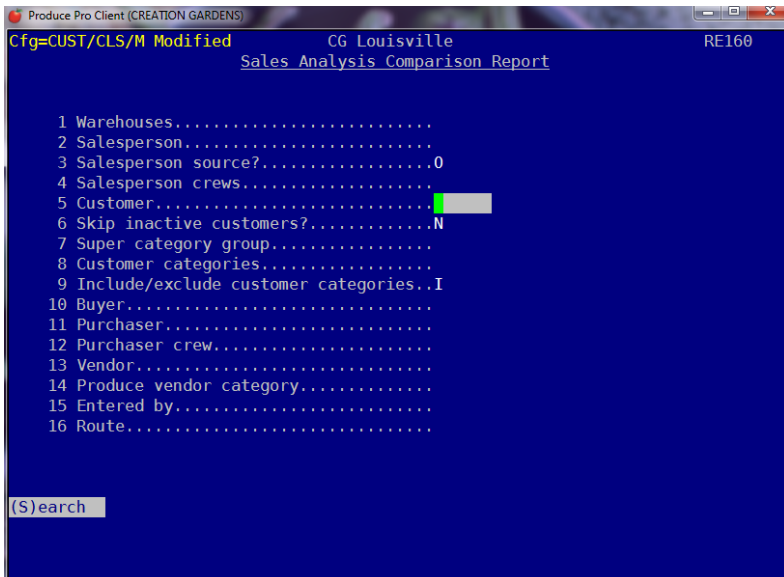# How To Run A Monthly Class Comparison By Customer:

After entering Produce Pro, go to 11 → Sales Analysis → 7 Sales analysis reports → 11 MORE → 8 Sales analysis comparison.
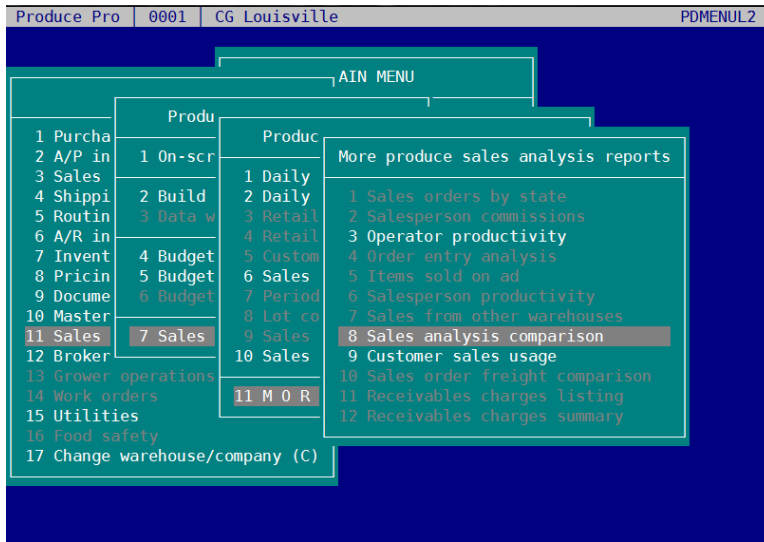

Go to CUST/CLS/M : CUSTOMER / CLASS MONTHLY
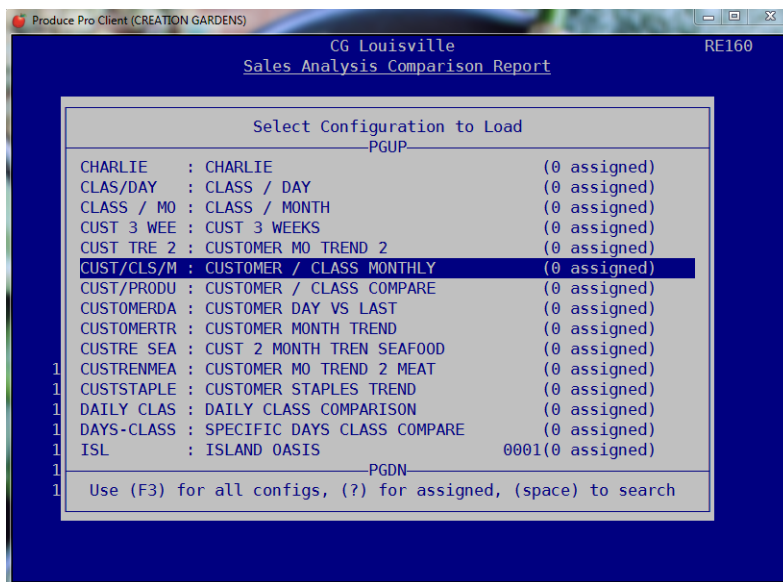
Enter the customer. For this example, I'm entering Branch. I hit "s" for search and then entered "branch" and selected Branch.

Then change the printer in line 1 to Email. You can also change the date in line 7. In this instance, the report will show sales from April and March of 2018. If it is the beginning of a month, you will need to choose the previous month.   Next hit Go.
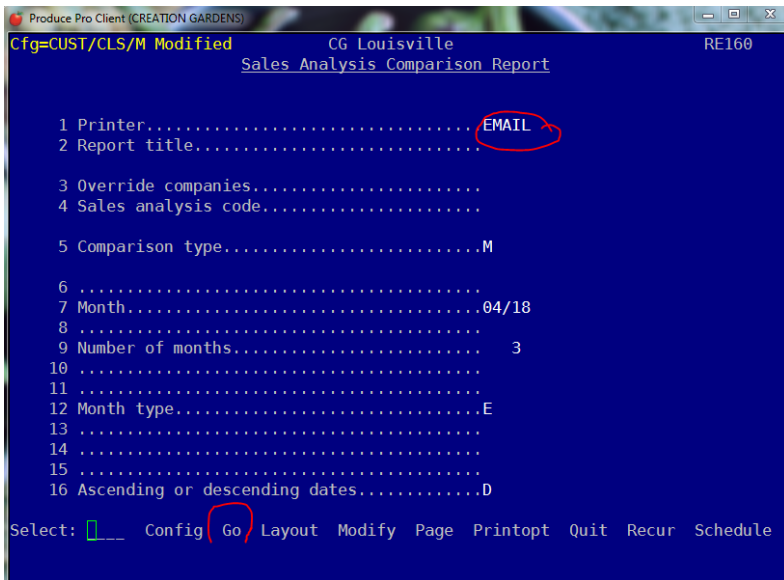
Enter your email address and a subject. Continue hitting enter until you are out of the report and the report will be emailed to you.

Cfg=CUST/CLS/M Modified   CG Louisville   RE161
                    Sales Analysis Comparison Report

                     Enter Email Destination

Mail Address..ljones@whatchefswant.com
Subject.......Testing
Comment.......

   9 Number of months........................   3
  10 ....
  11 ....
  12 Month type..............................E
  13 ....
  14 ....
  15 ....
  16 Ascending or descending dates...........D

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

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How to run a Profile Analyzer

Follow this path:

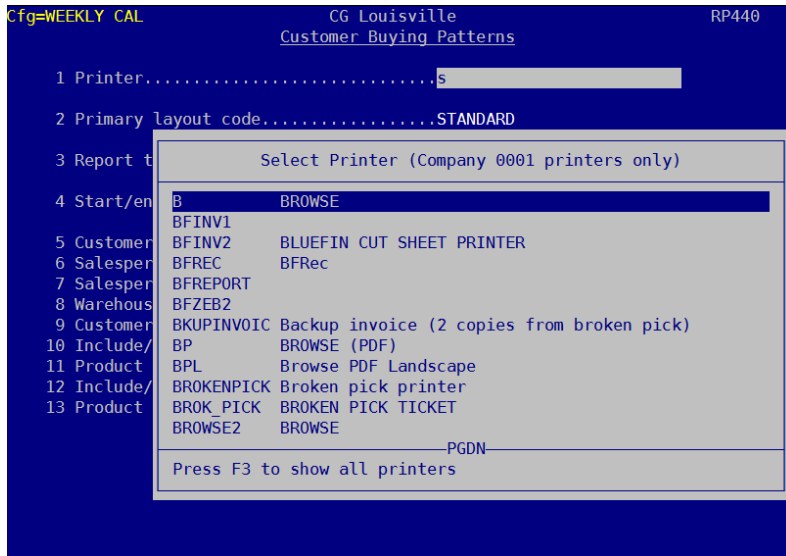3 – Sales Orders → 14 → Sales reports → 11 - MORE … → 4 – Customer buying patterns

Select the configuration, Weekly Cal : Weekly Calls
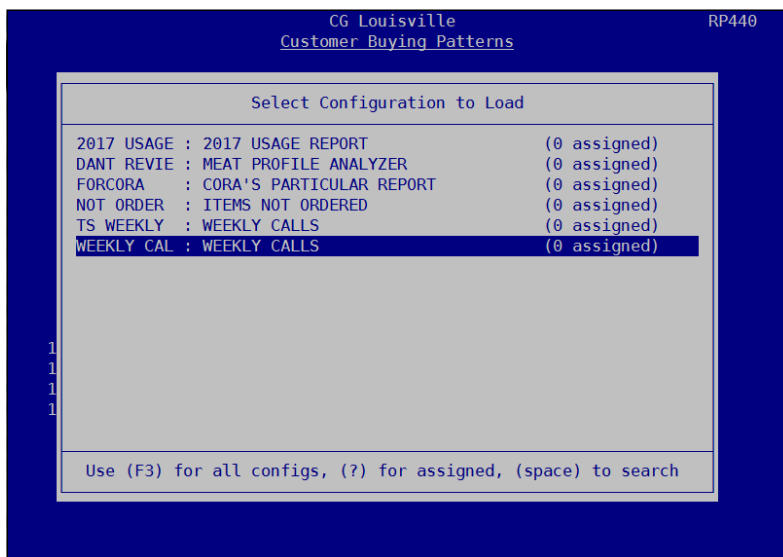
On line 1, select the printer you would like to use. Enter "1" go get to line 1 and then "s" enter to search for available printers. Once on the printer screen, you can start typing a printer name to jump to it or use the arrow keys to find the desired printer.

```
Cfg=WEEKLY CAL            CG Louisville                    RP440
                     Customer Buying Patterns

  1 Printer............................S

  2 Primary layout code.................STANDARD

  3 Report t┌─────── Select Printer (Company 0001 printers only) ───────┐
           │                                                           │
  4 Start/en│ B          BROWSE                                        │
           │ BFINV1                                                    │
  5 Customer│ BFINV2     BLUEFIN CUT SHEET PRINTER                     │
  6 Salesper│ BFREC      BFRec                                         │
  7 Salesper│ BFREPORT                                                 │
  8 Warehous│ BFZEB2                                                   │
  9 Customer│ BKUPINVOIC Backup invoice (2 copies from broken pick)    │
 10 Include/│ BP         BROWSE (PDF)                                  │
 11 Product │ BPL        Browse PDF Landscape                          │
 12 Include/│ BROKENPICK Broken pick printer                          │
 13 Product │ BROK_PICK  BROKEN PICK TICKET                            │
           │ BROWSE2    BROWSE                                         │
           │ ─────────────────── PGDN ────────────────                │
           │ Press F3 to show all printers                            │
           └───────────────────────────────────────────────────────────┘
```
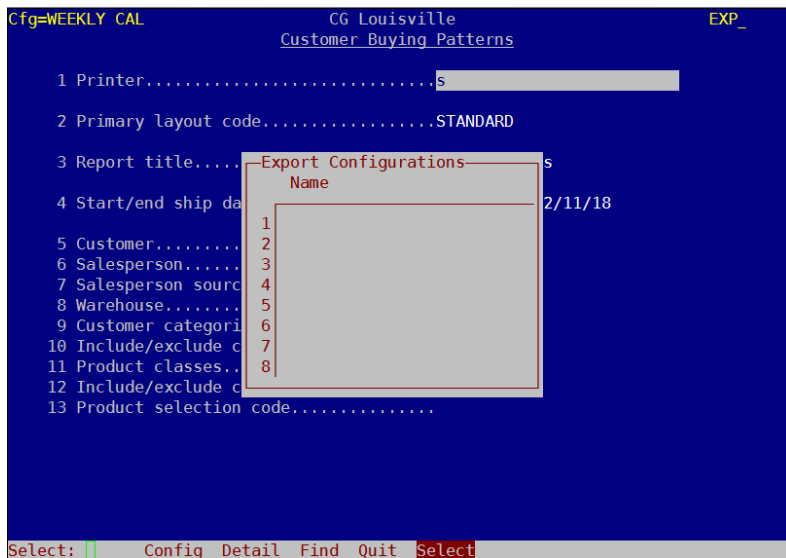
B – Browse (report will open up in Ppro)

EMAIL – report will be emailed to you in pdf form

X – Export (report will be exported to Excel and emailed to you)

If you pick X for Export, another screen will pop up; hit escape to go out of that screen.

```
Cfg=WEEKLY CAL            CG Louisville                    EXP_
                     Customer Buying Patterns

  1 Printer............................S

  2 Primary layout code.................STANDARD

  3 Report title.....┌─ Export Configurations ──┐s
                     │        Name              │
  4 Start/end ship da│                          │2/11/18
                     │ 1                        │
  5 Customer.........│ 2                        │
  6 Salesperson......│ 3                        │
  7 Salesperson sourc│ 4                        │
  8 Warehouse........│ 5                        │
  9 Customer categori│ 6                        │
 10 Include/exclude c│ 7                        │
 11 Product classes..│ 8                        │
 12 Include/exclude c└──────────────────────────┘
 13 Product selection code..............



Select: □___   Config  Detail  Find  Quit  Select
```

Or you can choose the printer in your region and print directly.

On line 4, enter the dates you would like this report run. Default dates are for the last week. You can enter the date in 6 digit form (100818 for October 8, 2018, for example) or hit "C" to bring up the calendar. To navigate the calendar, use the arrow keys to move on the current calendar or the Page up or Down keys to change months.

```
Cfg=WEEKLY CAL Modified          CG Louisville                    RP440
                         Customer Buying Patterns

     1 Printer............................X

     2 Primary layout code.................STANDARD

     3 Report title........................Weekly Calls

     4 Start/end ship dates................06/12/18   121218

     5 Customer............................
     6 Salesperson.........................
     7 Salesperson source..................1
     8 Warehouse...........................
     9 Customer categories.................
    10 Include/exclude categories..........I
    11 Product classes.....................
    12 Include/exclude classes.............
    13 Product selection code..............



(C)alendar
```

Next, enter the customer on line 5. Hit "5", then enter in the customer code or hit "s" enter to search for a customer.

```
Cfg=WEEKLY CAL Modified          CG Louisville                    RP440
                         Customer Buying Patterns

     1 Printer............................X

     2 Primary layout code.................STANDARD

     3 Report title........................Weekly Calls

     4 Start/end ship dates................06/12/18   12/12/18

     5 Customer............................
     6 Salesperson.........................
     7 Salesperson source..................1
     8 Warehouse...........................
     9 Customer categories.................
    10 Include/exclude categories..........I
    11 Product classes.....................
    12 Include/exclude classes.............
    13 Product selection code..............



(S)earch
```

For this example, I will be emailing the report to myself, for the customer, Jack Fry's for the last 6 months.

```
Cfg=WEEKLY CAL Modified          CG Louisville                    RP440
                       Customer Buying Patterns

    1 Printer...........................EMAIL    ←

    2 Primary layout code.................STANDARD

    3 Report title........................Weekly Calls

    4 Start/end ship dates................07/12/18  12/12/18  ←

    5 Customer...........................1JACKF JACK FRY'S  ←
    6 Salesperson.........................
    7 Salesperson source...................1
    8 Warehouse...........................
    9 Customer categories.................
   10 Include/exclude categories...........I
   11 Product classes.....................
   12 Include/exclude classes.............
   13 Product selection code..............


                                      ↓

Select: ▌___   Config  Go  Layout  Modify  Page  Printopt  Quit  Recur  Schedule
```

Enter "g" for Go to run the report.

When you get to this screen, enter the email address you would like this report to go to and a subject, if needed.

```
                        Enter Email Destination
       Email addresses..▌


       Email subject....


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

This report shows the items sold with the product number, quantity, how many orders, average price and last sales date. It's a good report to run to determine items that a customer used to buy but have stopped buying.

For example, this customer purchased 30, 5# bags of Ruby Trout, but has not had an order since 11/04. Could there be a menu change or is this customer buying this product from a different vendor?

```
                PRODUCT
                DESCRIPTION                        PRD #  QUAN   ORDERS  AVG PRC LAST DAT
======================================= ===== ====== ====== ======== ========

LOU - 1JACKF JACK FRY'S

      * * * PROFILE ITEMS SOLD * * *
BARRAMUNDI-FRESH FARMED              LB 48000    195      41   11.00 11/23/18
STRIPED BASS FILLET FARM 1BAS SKIN ON LB 48001   46       8   14.55 12/03/18
CORVINA FILLET WILD  1COR            LB 48028     28       3   10.67 11/09/18
ATLANTIC SKIN ON GROUPER  1GROA      LB 48035      5       1   21.41 10/11/18
GROUPER FILLET SKIN ON               LB 48046     68       8   17.82 10/23/18
HALIBUT FILLET                       LB 48052    145      14   17.02 11/28/18
MAHI MAHI FILLET SKIN ON WILD  1MAH  LB 48060     66       7   11.09 11/20/18
MAHI MAHI FILLET SKIN OFF WILD  1MAHS LB 48063     8       1   16.15 09/24/18
COPPER SHOALS REDFISH FLT S/ON       LB 48072     16       2   14.57 08/22/18
COPPER SHOALS REDFISH WITH SCALE FLT LB 48901      8       1   15.11 08/20/18
VERLASSO SALMON FLT PATAGONIA  5-6LB LB 48102   1098     103   11.72 12/12/18
VERLASSO SLMN FLT SCALED CHILE  5-6LB LB 49195    161      19   12.07 11/23/18
CARIBBEAN RED SNAPPER FILLET         LB 48115     46       7   19.51 12/12/18
WHOLE SNAPPER CARIBBEAN RED     8-15# AVG 48119     2       1   77.67 07/12/18
FRESH GOLDEN TILE FILLET 1TILE       LB 48181     11       3   13.88 09/08/18
10OZ BUTTERFLY TROUT 1TROB           LB 48140      5       1    8.68 08/25/18
RUBY TROUT FILLET FARMED USA 1TROR8  LB 48144    280      44   10.04 09/30/18
RUBY TROUT FILLET FARM USA      5 LB CS 48188     30      30   48.17 11/04/18
#1 TUNA LOIN NO/SK NO/BL WILD        LB 48149      8       1   21.72 08/23/18
#1 TUNA LOIN NO/SK CC NO/BL          LB 48150     53       6   20.66 12/01/18
WALLEYE FILLET  WILD CANADA          LB 48155     33       4   13.77 11/07/18
OYSTER EXTRA SELECT GALLON USA    GALLON 48221     38      40  100.33 12/12/18
DRY U10 CT SEA SCALLOPS WC USA       LB 48223     10       4   17.69 11/19/18
DRY U-10 CT SEA SCALLOPS WC       8LB CS 48231      8       8  135.74 10/25/18
LITTLENECK CLAMS FARMED 3CLAL     50 CT 48251       4       3   14.99 11/28/18
2LB MUSSEL CANADA KY001RS CAN    2LBS 48264        23      10    4.79 11/30/18
```

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