



Food Show System Guide

entree.FS Food Show Software



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Chapter 1

entrée.FS Product Features

1 entrée.FS Product Features

Welcome to [entrée.FS](#) the add-on module for processing Food Show Orders in the main [entrée](#) system in either [entrée version 3](#) or [entrée version 4 SQL](#) and in the [entrée.DSR](#) software.

Food Show Orders are a special type of an order that is very similar to a Sales Order, but with a few key differences. Like a Sales Order, a Food Show Order represents a firm commitment from your customer to purchase one or more products in certain quantities and with certain pricing, typically a discount from what they would normally pay. And, like a Sales Order, a Food Show Order does not itself represent an actual sale and so it has no effect on Accounts Receivable.

Food Show Orders are different in many ways, they do not affect Inventory and Allocations like an Invoice or Sales Order would. Also each line item on Food Show Orders can have it's own unique list of one or more scheduled deliveries over an extended period of time.

The basic design of the Food Show Order system assumes that each individual delivery represents a weekly amount but you are free to set up any schedule that you wish. It is this extended delivery time (as much as ten weeks in typical practice, possibly more) that makes it difficult to include a Food Show Order normally in the "allocations area" of Inventory Control. This is because it would essentially "lock down" in your allocated quantity a potentially large quantity of product which might not need to be delivered for several weeks.

Another key difference in Food Show Orders is that they have a dedicated system for defining Promotions. Since there are different considerations for discounts given on a Food Show Order, rather than using the regular Promotions feature in [entrée](#), we have a feature to define promotions that is only used for Food Show Orders.

A Food Show Promotion typically specifies a discount off of the customer's regular price for an item but it also has the ability to specify a Unit Price directly. We will discuss this in a little more detail in the following section when we explain how to set up a Food Show Promotion.

The final major feature of the Food Show Order is the handling of those extended delivery schedules. Since the Food Show Order itself does not represent an actual sale, the various deliveries which are specified on the Food Show Order must ultimately be added to regular invoices.

The Food Show Order system provides support for doing this easily through Create/Change Invoice. There are a variety of features which support the process of entering and fulfilling the Food Show Orders and we will discuss each of them in further detail starting with the Food Show Promotions.



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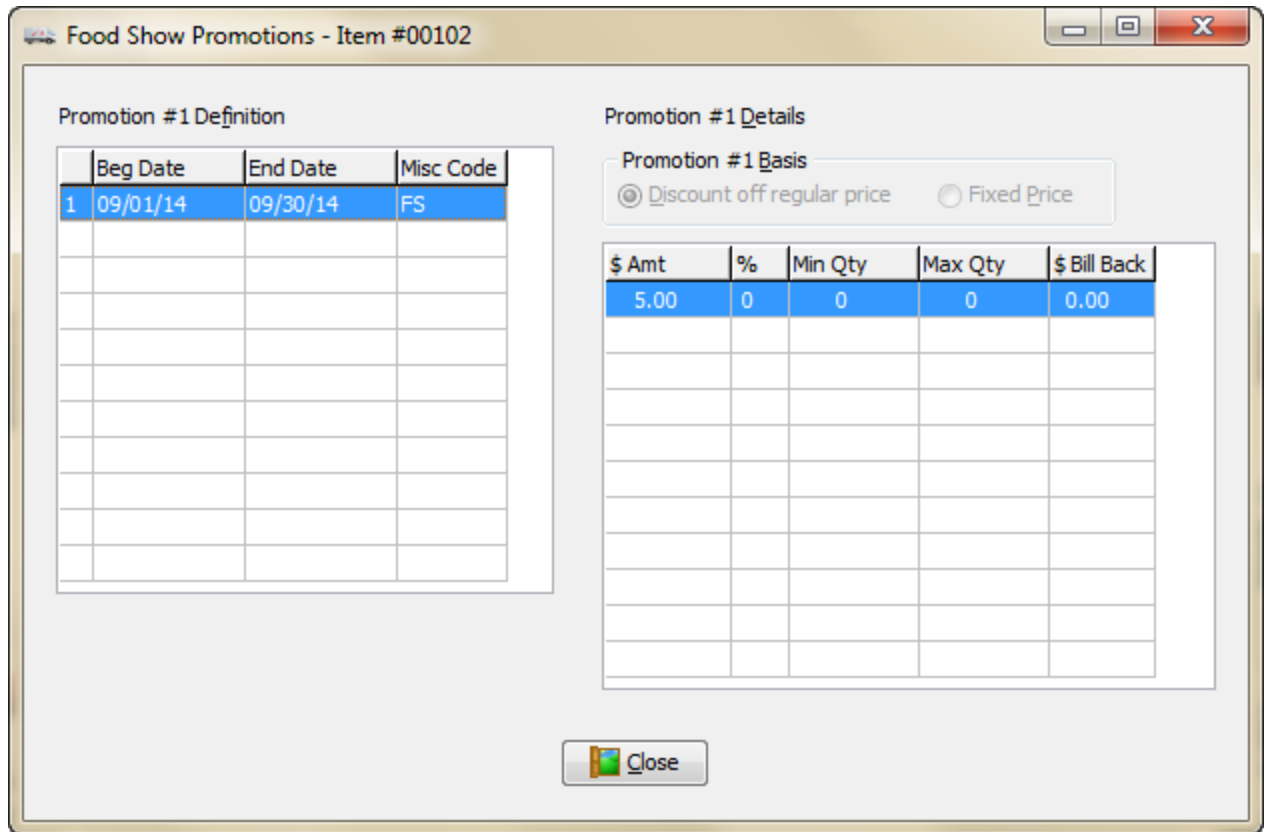
NECS, Inc. 322 East Main Street 3rd Floor Branford, CT 06405
Phone: 203.245.3999 **Toll Free:** 800.766.6327 (NECS) **Fax:** 203.245.4513

1.1 Promotions & Orders

Track Food Show Promotions and Orders with Ease

Many food distributors have found that holding a Food Show for their customer base, along with vendor participation, is a great way to build their business, introduce new products and provide attractive buying options for their customers. The **entrée.FS** software module was created for the needs of food distributors who hold their own Food Shows. It works directly with **entrée version 3** or **entrée version 4 SQL** and if used, **entrée.DSR** (laptop based order entry for off site entry of orders) to ensure customer orders taken at the food show are properly tracked, delivered, priced and fulfilled.

The basis of any Food Show Order is each item's "Food Show Promotion" definition where you can define your promotions to be either discount-based or fixed price-based and also set a minimum quantity and a maximum including any any vendor Bill Back amount that is associated with the promotion.



Food Show Worksheets

You can generate paper based "Food Show Worksheets" for your sales staff to write down customer order information to be later entered into **entrée**. This is the default layout for the worksheet which can be customized for your sales information requirements in the Layout feature.

Date: 09/02/14		Madison Distribution							Page: 1	
Time: 10:31 AM		Report Name: Food Show Report								
Item Number	Pack Size	Unit of Measure	Brand Name	Description Line 1	Show Discount	1	2	3	4	Total
xxxxxxx	xxxxxxxxx	xxxx	xxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	xxxxx	xx	xx	xx	xx	xxxx
xxxxxxx	xxxxxxxxx	xxxx	xxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxx	xxxxx	xx	xx	xx	xx	xxxx

Customer Food Show Orders Delivery Schedule

When creating or editing Food Show Orders, you will be asked to provide the details for the item including specifying the total order quantity which the customer wishes to purchase.

Customer Number BRO203 Order Number Rev Order Date 09/03/14

BROADWAY CAFE
203 N BROADWAY
TROTWOOD, OH 45426

P.O. Number

+ Add - Delete Food Show Items Edit Comments

Item #	UOM	Description	Pack Size	Order Qty
00102	CASE	CHEESE BRIE IMPORTED TINS	12/4.50Z	50

Pack: 12/4.50Z Line: 1 of 1
Brand: PRESIDENT On Order: 0 \$5.00 off

OK Cancel

The Delivery Schedule allows you to define as many individual deliveries as necessary for the order. Keep in mind that the quantity entered is intended to specify the customer's requirement for an entire week. At the time of delivery the specified quantity may be divided over two or more different invoices (half on Tuesday and half on Friday, for example) so it is not strictly necessary to specify the actual delivery schedule in detail but you can if you wish to do so.

You can save time by using the Delivery Schedule Generator tool in Edit Food Show Item if the customer's desired delivery schedule can be expressed in simple terms, such as:

"deliver 10 per week starting June 14th".

Item Number 00102
Description CHEESE BRIE IMPORTED TINS

Total Order Quantity 50 Quantity To Be Scheduled 0

Delivery Schedule
Deliver 10 every 1 week
starting 06/14/14
Apply

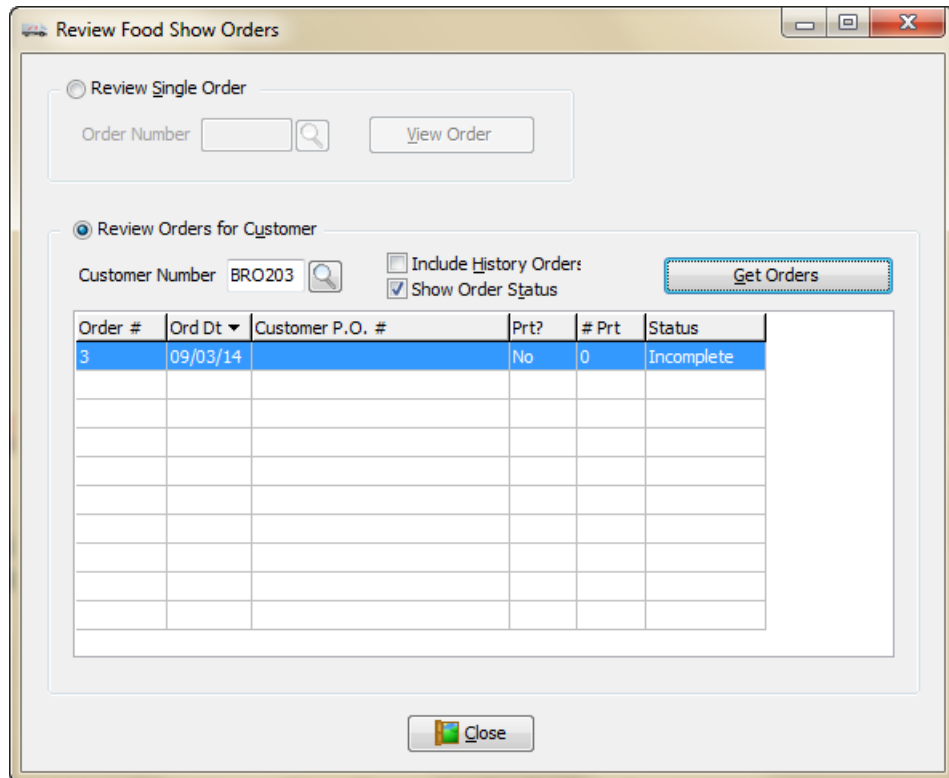
Date	Qty
06/14/14	10
06/21/14	10
06/28/14	10
07/05/14	10
07/12/14	10

OK Cancel

1.2 Order Review & Reports

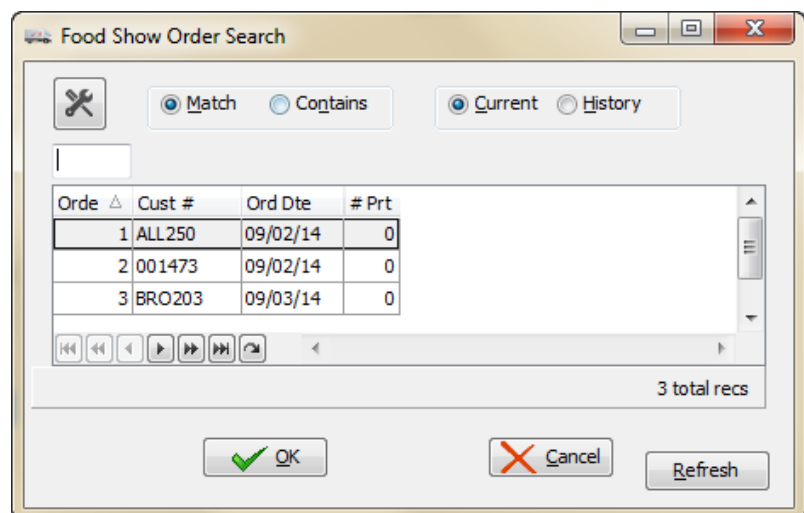
Reviewing Food Show Orders

Since many aspects of the fulfillment of Food Show Orders are either automatic or can be handled by any or all of your order taker staff (adding items to invoices and specifying appropriate quantities), keeping track of your Food Show Orders can sometimes be a challenge. To help manage your Food Show Orders, the **entrée.FS** software module provides a "Review Orders" utility.



This utility provides multiple ways to review your orders by customer number or order number. It allows you to look at individual Food Show Orders in detail or just see a quick overview of the orders for a specific customer with the order status.

A new more powerful search feature in **entrée version 4 SQL** will provide you with the tools and search options to find any order quickly.



Report Options for Food Show Orders

In addition to the interactive review process, we have also provided the "Food Show Orders Report" which will give you more of an overview of your Food Show orders. Here you can use the "All" option to list the entire delivery schedule, the "Open" option to list only deliveries which have not been fulfilled, the "Filled" option to show only deliveries which have been filled and the "To Fill By" option to look at all unfulfilled deliveries due before a certain date.

Food Show Orders Report

You can generate paper based Food Show Order reports or create PDF report files to email to your sales staff to share customer order information. This is an example using the default layout for the report which you can also be customized for your business.

Order Number	Revision Number	Order Date	Item Number	Description Line 1	Total Filled	Billback Amount	Promotion Description	Promo Start	Promo End
Date: 09/03/14 Time: 10:21 AM Madison Distribution Food Show Orders Page: 1									
Covers Period: Sep 02 2014 - Sep 03 2014									
Customer Number: 001473 - AIRLINE DRIVE INN THEATRE									
2	1	09/02/14	00102	CHEESE BRIE IMPORTED	0.00	0.00	\$5.00 off	09/01/14	09/30/14
001473 - AIRLINE DRIVE INN THEATRE Sub-Totals:									
2	1				0.00	0.00			
Customer Number: BRO203 - BROADWAY CAFE`									
3	0	09/03/14	00102	CHEESE BRIE IMPORTED	0.00	0.00	\$5.00 off	09/01/14	09/30/14
BRO203 - BROADWAY CAFE` Sub-Totals:									
3	0				0.00	0.00			
Report Totals:									
5	1				0.00	0.00			



Chapter 2

Contact NECS

2 Contact NECS



- Please visit our website at www.necs.com to learn about our other add-on modules, products and services.
- Contact our **NECS Sales Department** at sales@necs.com for more information.
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NECS, Inc.

322 East Main Street, Third Floor
Branford, CT 06405

Office Hours: Monday - Friday from 8:30AM EST - 5:30PM EST

Toll Free: 800.766.6327 (NECS) **Phone:** 475.221.8200 **Fax:** 203.208.0889



Chapter 3

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3 License Agreement

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Updated September 2016



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Chapter 4

System Requirements

4 System Requirements

entrée.FS

Requires you have the latest version of the main **entrée system** either **entrée V3** or **entrée V4 SQL**.

entrée V4 SQL Requirements

V4 Server Requirements

- Windows 2008 Server / Windows 2012 Server (including Standard and Server Essentials).
- Dual Core processor. Note that the Sybase Advantage Database Server supports multiple processors on Windows. It is multi-threaded and will perform each user request database operation concurrently or in parallel if multiple processors are present.
- Intel Xeon 2.4 GHz or greater
- 16GB RAM
- Windows 64-Bit
- 500GB hard drive, 1TB recommended / 3TB recommended if using **entrée.DOC** and a high volume of invoice, etc. images are stored (more than 1,000 images/day to provide sufficient space for at least 7 years).

V4 Workstation Requirements

- Windows 7 / Windows 8
- Intel 15 or greater
- 4GB RAM
- 1360 x 768 minimum monitor resolution
- 60GB hard drive

Remote Desktop requirements

- **Minimum Terminal Server requirements (for up to 10 workstations):**

- Dual core Xeon processor 2.2GHz +
- 4 GB Ram
- Windows 2003 Server R2

- **Recommended Terminal Server requirements (for up to 10 workstations):**

- Quad core Xeon processor 2.33GHz +
- 8 GB Ram
- Windows 2008 Server 64 Bit

Note: The **entrée** data files should not be installed on the terminal server. Instead they should live on a separate file server.

entrée.DSR Laptop Requirements

Works with any Windows based laptop running **entrée.DSR** Windows XP / Windows Vista / Windows 7 / Windows 8.



Chapter 5

Accessing System Guides

5 Accessing System Guides

Online System Guides

The **entrée.FS System Guide** is distributed in electronic format and is installed by default along with the application.

- Users may view the entire contents of the manual from within the program by using the **F1** key to access the help system.
- A printable format (Adobe PDF) is provided for your convenience.
- Adobe Reader (included) is required to read this file and may also be obtained for free via the internet using

the **Get Adobe Reader** icon.



1. In your browser go to the necs.com website and click the **Support** drop down menu.
2. Click and use the **Customer Login** to enter the secure area of the website. In this area release upgrades are posted along with links to other support services and documentation.
3. In the menu on the left click either the **System Guides** or **KnowledgeBase** option. On this web page you can access to the documentation and system guides that support all our software products.
4. Click the **entrée.FS** option.
5. Then select **entrée.FS System Guide** from the list on the right. A new window will open in the browser for the guide. From here you can choose to browse or download the guide to your computer.

Or

In your browser use this direct link to the [entrée.FS System Guide KnowledgeBase](#)

entrée System Online Resources

- **entrée V4 SQL KnowledgeBase** link: [entrée V4 SQL KnowledgeBase](#)
- **entrée V3 KnowledgeBase** link: [entrée V3 KnowledgeBase](#)



Note Although it is possible to print from within the help system of the program, due to the poor formatting results this is not recommended. NECS suggests printing from within Adobe Reader for optimal results.



Chapter 6

Getting Started with entrée.FS

6 Getting Started with entrée.FS

About entrée Versions

With the release of **entrée version 4 SQL** in 2014 and the major differences between the menus and screens in both **entrée** versions 3 and 4 we have included instructions for using both versions of **entrée** in this guide.

To differentiate topics for each major version of **entrée** you will see color coded **entrée V3** or **entrée V4 SQL** headers in the impacted topics to direct you to the correct information for your system. You will see this designation throughout this guide.

This guide will provide you with a detailed overview of the **entrée.AP** add-on module for the **entrée** system you are running.

Defining Food Show Promotions

The basis of any Food Show Order is the Food Show Promotion. In fact, items may only be added to a Food Show Order if the customer qualifies for a Food Show Promotion on that item.

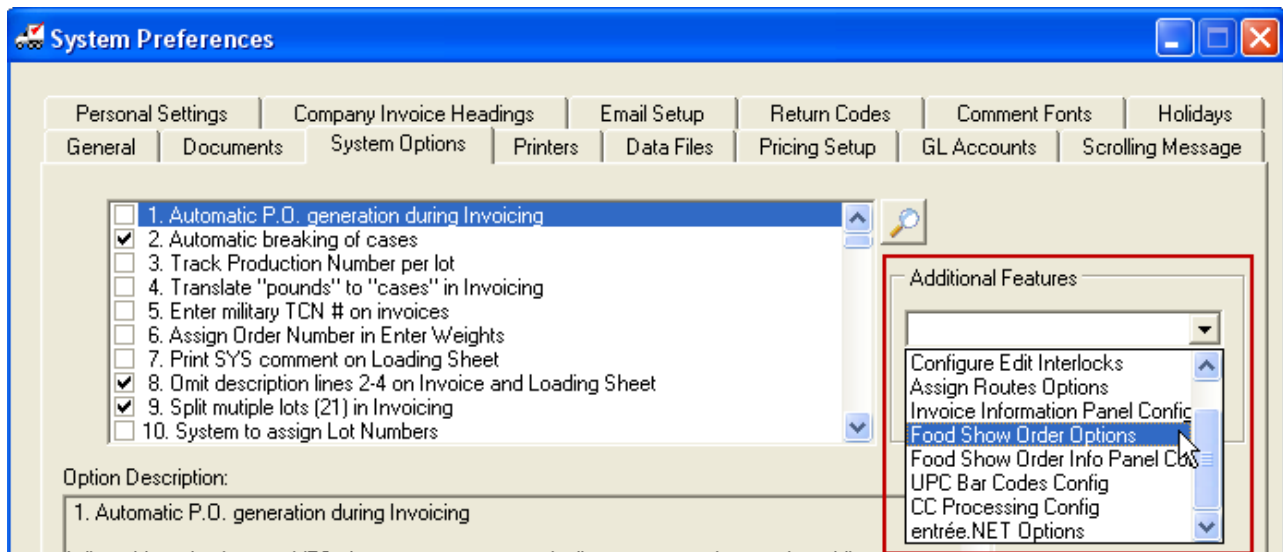
Like regular Promotions, Food Show Promotions are defined in **Inventory File Maintenance** in your the main **entree** software. A new **Food Show Promotions** tab option appears when the Food Show feature is activated in your **entrée system**.

First, Set your Food Show Order Options

The System Options Additional Features utility provides two option settings related to Food Show Orders, Food Show Orders Options and Food Show Order Info Panel Config.

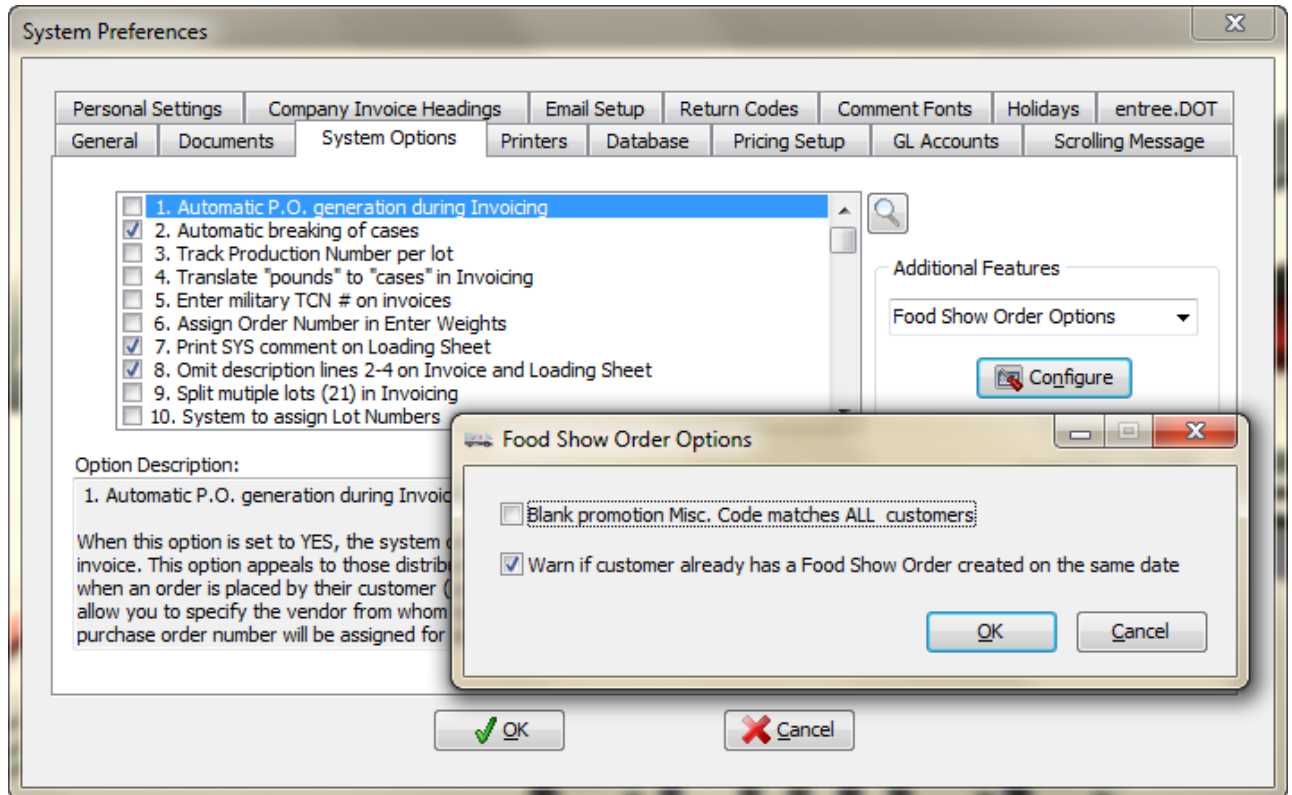
entrée V3

1a. Use menu path: **System > Preferences > System Options tab >** on the right side is the **Additional Features** section > click to view the drop down menu and select **Food Show Order Options**.



entrée V4 SQL

- 1b. Go to the **System** ribbon menu > **System Preferences** > **System Options Tab** > click the **Additional Features** drop down menu and select **Food Show Order Options**.



- **The Food Show Order Options feature has two options:**

- **"Blank promotion Misc. Code matches ALL customers"** - Checking the "Blank promotion" option will permit the Food Show feature to accept any promotion with a blank Misc. Code value regardless of the content of the customer's Misc. Code.

Explanation: The "Blank promotion" option addresses two cases related to the original design of the Food Show feature.

a) It was required that if the customer's Miscellaneous Code was non-blank then it had to match the Miscellaneous Code which was assigned to the Food Show Promotion. So the Customer Misc. Code assignment was being used to identify customers who were eligible to receive Food Show promotional pricing.

b) In the second case, the distributor was using the Customer Misc. Code for other purposes, so the original requirement that the codes match (or that the customer's Misc. Code would be blank) did not work for them.

- **"Warn if customer already has a Food Show Order created on the same date"** - The "Warn if same date" option is a quick duplication check similar to the one performed in Invoicing.

Explanation: The Create Food Show Order feature is looking to see if the current customer already has a Food Show Order with the same Order Date as the new order. If a match is found the system displays this message: This customer already has a Food Show Order with an Order Date of xx/xx/xx.

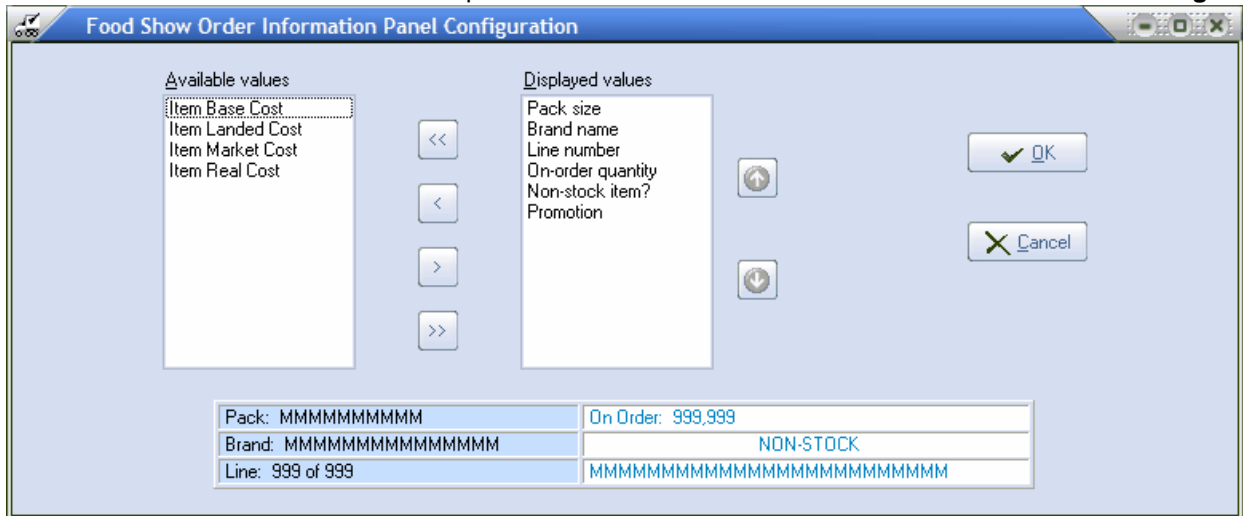
2. Click the **Configure** button on the Systems Options tab and the **Food Show Order Options** dialog box will be displayed.
3. Make your selections in **Food Show Order Options** and click **OK** or **Cancel**.

Second, Configure the Food Show Order Information Panel

Now proceed to update the **Food Show Order Information Panel** accessed from the Additional Features drop down menu. The Food Show add-on module comes with the configuration pre-loaded into the Order Information Panel. In the event that modifications need to be made to customize the information in this panel follow these update instructions.

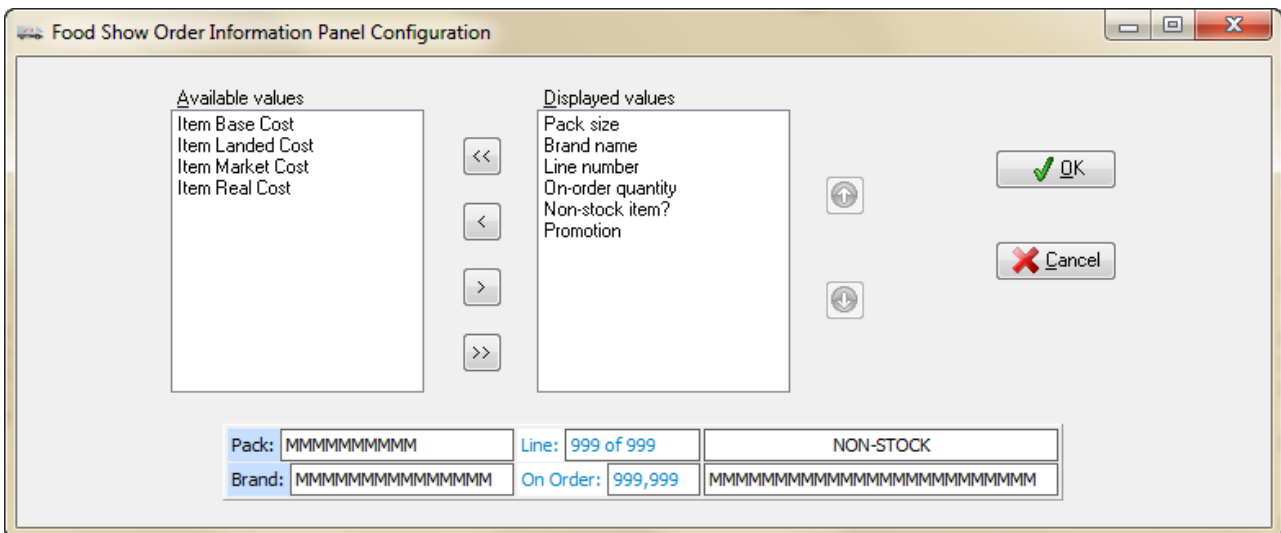
entrée V3

1a. Use menu path: **System > Preferences > System Options tab** > on the right side is the **Additional Features** section > click to view the drop down menu and select **Food Show Order Info Panel Config.**



entrée V4 SQL

1b. Go to the **System** ribbon menu > **System Preferences > System Options Tab** > click the **Additional Features** drop down menu and select **Food Show Order Info Panel Config.**



2. Now click the **Configure** button.

3. Use the arrows to add to, remove, and order the fields in the Displayed values list on the right.

4. Click **OK** to save the configuration or **Cancel**.

5. Click **OK** on the main System Options tab when done.

The results of the configuration of the **Food Show Order Information Panel** are in the red outlined "Promotion" panel in the **entrée V3** image below. Among other things the Promotion panel shows you the promotion that was selected for the item. If we look at the definition of our single promotion for this item we see that there is a \$2.00 discount off of the customer's regular price.

entrée V3

Customer Number: ANN10 Order Number: Rev: 1 Order Date: 06/24/10

ANN SAND ENTERPRISES
2419 WEST ST
SALEM, MA 01912

P.O. Number:

+ Add - Delete Food Show Items Edit Comments

Item #	UOM	Description	Order Qty
20100	CASE	BEEF GROUND 81/19	10

Pack: On Order: 0

Brand: IBP

Line: 1 of 1 \$2.00 off

OK Close

entrée V4 SQL

Customer Number: 001473 Order Number: 2 Rev: 1 Order Date: 09/02/14

AIRLINE DRIVE INN THEATRE
TEICHER THEATERS
PO BOX 5410
SUN CITY CENTER, FL 33571

P.O. Number: 4587312

+ Add - Delete Food Show Items Edit Comments

Item #	UOM	Description	Pack Size	Order Qty
00102	CASE	CHEESE BRIE IMPORTED TINS		4

Pack: Line: 1 of 1

Brand: PRESIDENT On Order: 0 \$5.00 off

OK Cancel

- Now proceed to the third step and **Define a Food Show Promotion** to begin setting up your Food Show.

Third, Define a Food Show Promotion

entrée V3

1a. Use menu path: **File > Inventory Maintenance**.

entrée V4 SQL

1b. Go to the **Inventory** ribbon menu > **Inventory**.

2. Find the item for the Food Show in **Inventory Maintenance**.

3. Click the **Food Show Promotions** tab for the item.

4. In the **Food Show Promotions** tab you will update the **Promotion Definitions** and **Promotion Details** sections. An overview of these sections and update instructions follows.

- A Food Show Promotion is very similar to a regular Promotion in **entrée**. Where regular Promotions use a single edit grid, for Food Show Promotions only a few key values need to be entered once.

entrée V3

The screenshot displays the 'Inventory File Maintenance' window. At the top, the 'Item Number' is 10117, 'Description' is 'CHICKEN STRIPS BREADED', and 'Brand Name' is 'PARADE'. Below this, 'Unit of Measure' is 'CASE', 'Pack Size' is '1/10#', 'Warehouse Loc.' is 'F101', and 'Class' is 'FROZEN CHICKEN'. The 'Food Show Promotions' tab is active, showing two main sections: 'Promotion #1 Definition' and 'Promotion #1 Details'.

Promotion #1 Definition

	Beg Date	End Date	Misc Code
1	09/02/14	10/01/14	F2

Promotion #1 Details

Promotion #1 Basis: Discount off regular price Fixed Price

\$ Amt	%	Min Qty	Max Qty	\$ Bill Back
2.00	0	0	0	0.00

At the bottom of the window, there are navigation buttons (back, forward, etc.), a record count of '103 records', and action buttons: 'Add Item', 'Copy Item', 'Delete Item', 'OK', 'Cancel', and 'Apply'.

entrée V4 SQL

- In the **Promotion Definitions** section you will specify the **Beginning Date** and the **Ending Date** for the promotion as well as the **Customer Miscellaneous Code** to which the promotion applies (if any).
- On the right is the **Promotion Details** section, where you can define one or more quantity breaks and the discounts or pricing which apply to the **Promotion Definition** selected on the left. The Food Show Promotion allows you to define as many quantity breaks as you wish for a single **Promotion Definition**.
- You may create as many **Promotion Definitions** as you wish where regular Promotions limit you to an absolute maximum of 10 promotion entries for an item.

Note

One other thing to note about Food Show Promotions is that the open limit on the number of different promotion definitions allows out-of-date promotions to be kept around. The idea is that, while these promotions will only be active for a short period of time, when setting up the promotions for this year's Food Show it might be helpful to look back at last year's promotions and see how they were defined.

- The **Promotion Definition** section will sort the definitions in *descending* order by **Beginning Date** (so newest Beginning Date at the top, oldest at the bottom).


Fourth, Add a Food Show Promotion to an Item

- You will start in the **Promotion Definitions** section and then configure the **Promotion Details** section to complete the process. First fill in the Promotion Definitions section.

1. Click on the grid and hit "Insert" or click the green plus "+" button in the center of the page.
2. Enter the **Beginning Date** and **Ending Date**.
3. If necessary, enter the **Customer Miscellaneous Code**, as shown in the example below.
4. When you leave the **Misc Code** field the definition entry is complete and the **Promotion Details** section will now be enabled.

 **Note**

- For the Food Show Promotion to be considered valid, a **Beginning Date** must be defined. The **Ending Date** is optional.
- If you leave the **Ending Date** open that means the promotion *never* expires. You will then need to be careful about old Food Show Promotion entries in the entrée system.
- The **Misc Code** value can be left blank, meaning that the promotion applies to any customer, or you can specify a value to limit a given promotion to a specific group of customers.
- A non-blank value for **Misc Code** means that only customers set up with that exact **Misc Code** value will be eligible to receive the promotion. To assign customers a specific **Misc Code** value for a Food Show go to the "**Miscellaneous 1**" tab of **Customer File Maintenance**.

 **Hot Tip!** For more information about the Promotions and Misc Codes refer to the Inventory Promotions Tab and Miscellaneous 1 Tab sections of the in the System Guide for your version of **entrée**. See the links in the [Accessing System Guides](#) section of this guide.

Promotion Details Section Overview

As with a regular Promotion, a Discount-based Food Show Promotion allows you to set either a dollar amount deduction or a percentage deduction (never both) off of the customer's prevailing price at the time of delivery. With the Price-based Food Show Promotion, you specify an absolute **Unit Price** that will be used for all deliveries which are filled for this item using this promotion.

You can also set a **Minimum Quantity** and a **Maximum Quantity** as well as any vendor **Bill Back** amount that is associated with the promotion. It is recommended that you not overlap your Min/Max ranges but the edit process will not enforce this. However, when selecting the quantity break for a given item the application will select the first break point that matches the item quantity so overlapping break ranges serves no real purpose.

When defining your Food Show Promotions, and especially if you define any quantity breaks, keep in mind that Food Show Promotions are applied a little differently from regular Promotions. Where regular Promotions apply to the quantity being delivered on a specific invoice, a Food Show promotion could affect dozens of different invoices over a period of several weeks. If we were to individually choose and apply a promotion for each delivery related to a single Food Show Order, it would be difficult for you (or your customer) to predict what their discount would be for placing an order with you.


The Food Show Order is designed to select a promotion for each line item based on the Order Date of the document (the date on which the Food Show Order was created) and the *total* quantity being purchased on the item (regardless of the delivery schedule). The promotion chosen based on those factors is then locked in for that item for the life of the order.

Configure the Promotion Details

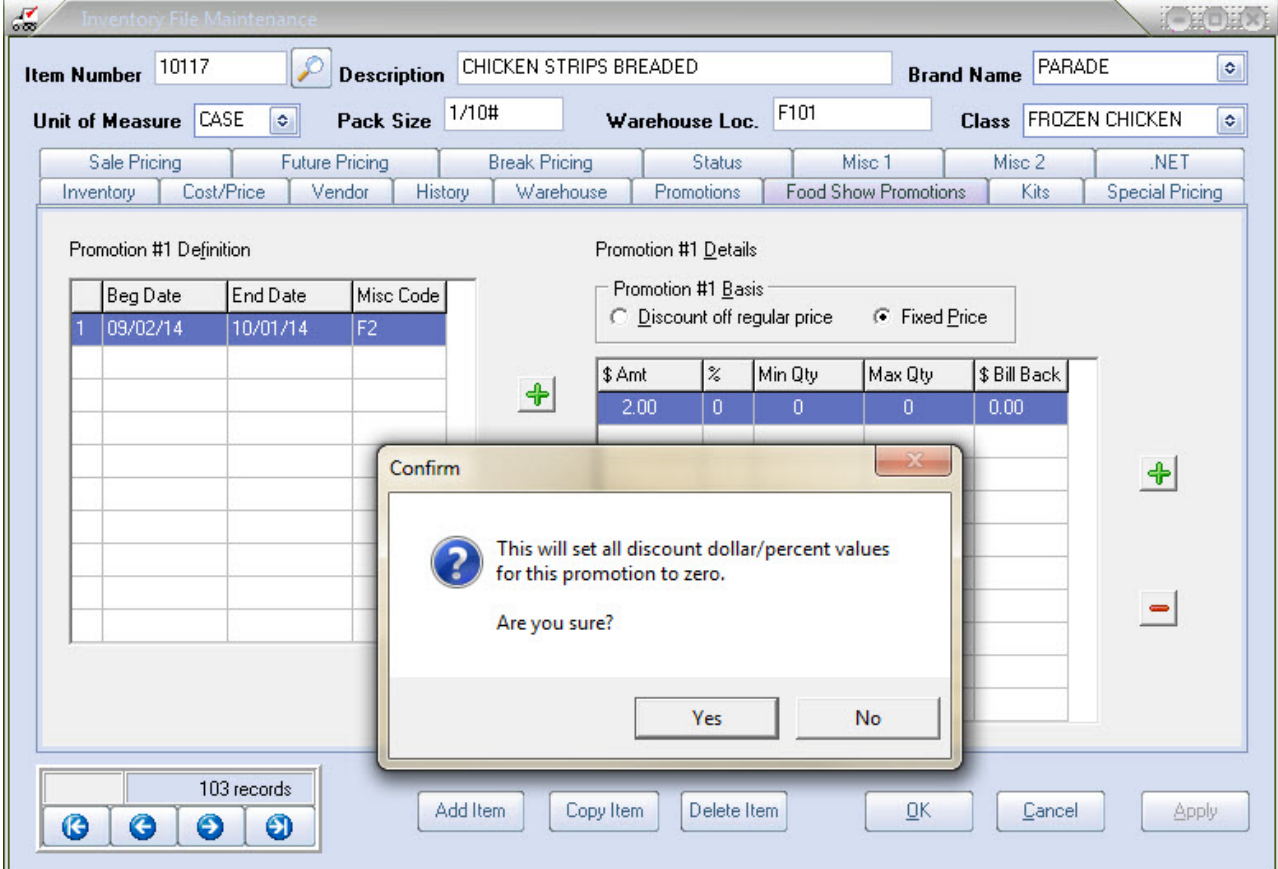
1. Go to the **Promotion Details** edit grid and select your **Promotion Basis** by clicking the radio button for one of the following options:
 - **Discount off regular price** - This option configures a discount off whatever price the customer is paying at the time of the Food Show Order on products delivered.
 - **Fixed Price** - This option will lock in a specific price that will override any other pricing considerations when fulfilling a Food Show Order. If you switch to "**Fixed Price**" mode you'll see in the images below that the layout of the edit grid changes slightly.
 2. Click on the grid and hit the "Insert" key to edit the values.
 3. Once you have defined all of the promotions that you need for the item click **Apply**.
 4. Click **OK** to save. Now the Food Show Promotion information has been saved for that item.
-

About Changes to Promotion Basis

One other thing worth noting is that you are allowed to reset the **Promotion Basis** selection even after you have defined break points.

 **Example** For instance, if you started defining a promotion as being **Discount-based** and decided to make it **Price-based** you could click the **Fixed Price** radio button and, if you already had one or more break points defined, you would see the following confirmation message.

entrée V3



Inventory File Maintenance

Item Number: 10117 Description: CHICKEN STRIPS BREADED Brand Name: PARADE

Unit of Measure: CASE Pack Size: 1/10# Warehouse Loc.: F101 Class: FROZEN CHICKEN

Promotion #1 Definition

	Beg Date	End Date	Misc Code
1	09/02/14	10/01/14	F2

Promotion #1 Details

Promotion #1 Basis: Discount off regular price Fixed Price

\$ Amt	%	Min Qty	Max Qty	\$ Bill Back
2.00	0	0	0	0.00

Confirm

? This will set all discount dollar/percent values for this promotion to zero.


Are you sure?

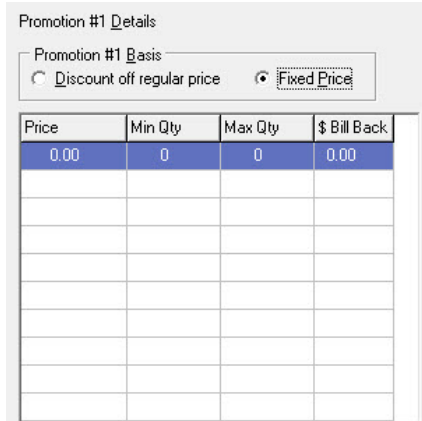
Yes No

103 records

Add Item Copy Item Delete Item OK Cancel Apply

- If you answer **"No"** then the "Basis" setting will revert back to "Discount" and nothing else will be changed.
- If you answer **"Yes"** then the edit grid reconfigures itself for a Price-based promotion by setting the current promotion to zeros as seen in the example here.

 **Note** Notice that your original break points are preserved but all the prices are **zero**. Just don't forget to enter the appropriate prices for each break point.



Promotion #1 Details

Promotion #1 Basis: Discount off regular price Fixed Price

Price	Min Qty	Max Qty	\$ Bill Back
0.00	0	0	0.00

IMPORTANT: The Food Show Order system does not establish a direct link between order line items and their promotions.

It is highly recommended that you *do not redefine* an existing promotion if there is any chance that orders have been created using the current configuration. While it is true that the order line items do grab the key parameters from the promotion and hold onto them, editing a line item after changing its promotion **will apply the new promotion terms** instead of retaining the original terms. This also means that changing a promotion definition you will **not** be able to update any existing orders which use that promotion.



Chapter 7

Processing Food Show Orders

7 Processing Food Show Orders

7.1 Creating / Changing Food Show Orders

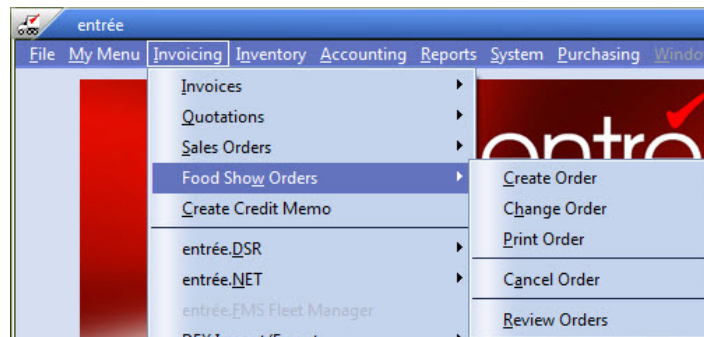
The process of creating new Food Show Orders, or changing existing orders, is handled the same as other **entrée** document. When the Food Show feature is activated on your **entrée** system a **Food Show Orders** menu option is added to both your main **Invoicing** menu and your Invoicing menu in the **entrée.DSR** software as shown. These options are used to create and maintain Food Show orders.

Creating Food Show Orders

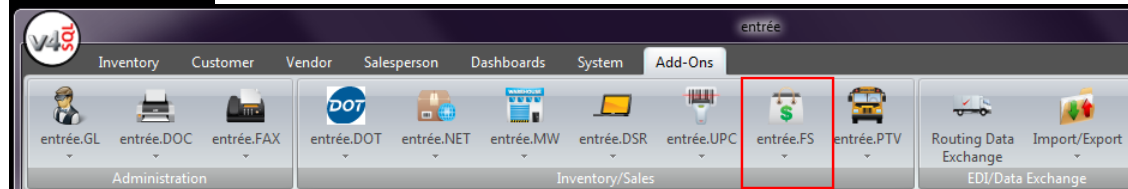
The **Create Order** and **Change Order** options are essentially the same. Here is the **Create Order** process in detail.

entrée V3

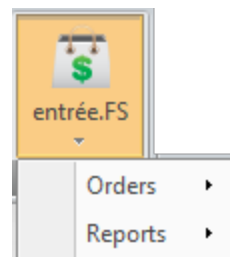
- 1a. Use menu path: **Invoicing > Food Show Orders**



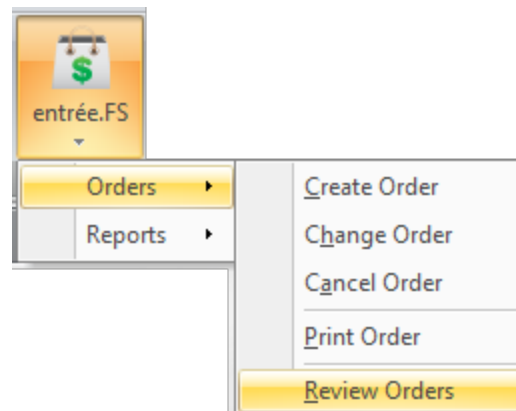
entrée V4 SQL



- 1b. Go to the **Add-Ons** ribbon menu > **entrée.FS** drop down menu.




Select the **Orders** drop down menu.

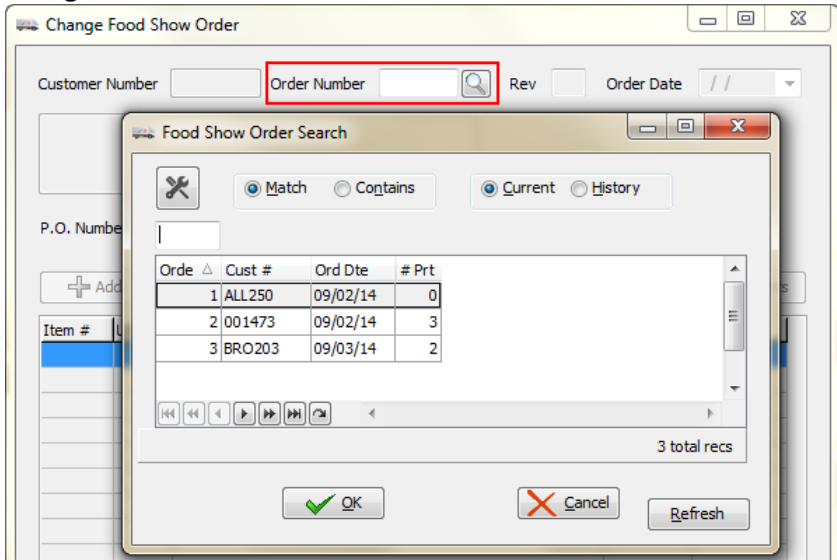


2. Select **Create Order** and the **Create Food Show Order** main order entry dialog is displayed.

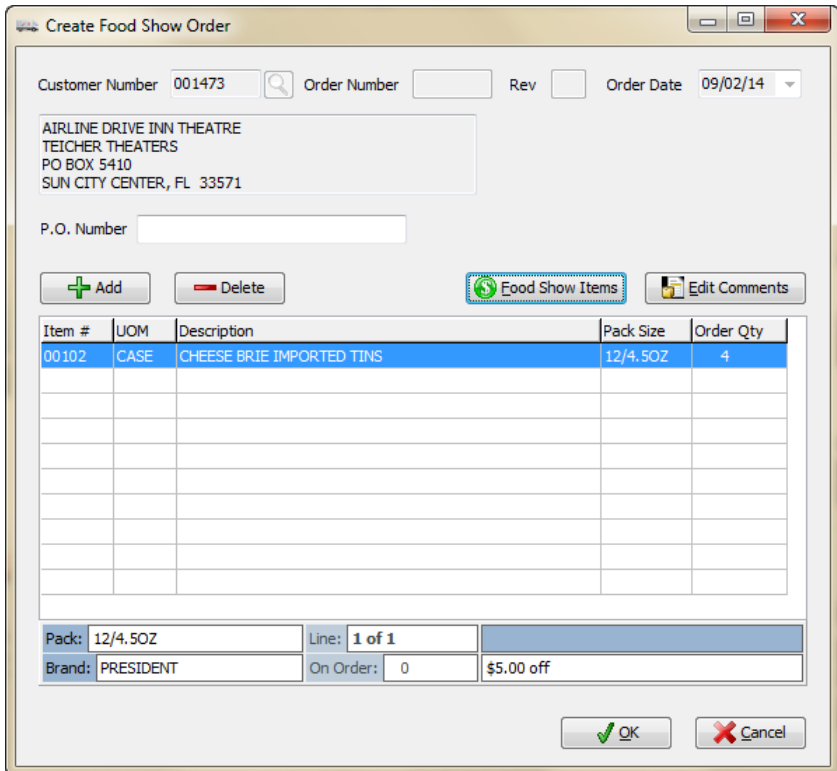
3. For **Create Order** you start by entering the **Customer Number** or use the Customer Search tool  to find the customer.

- In **Change Food Show Order** you either enter the **Food Show Order Number** or use the Food Show Order Search tool  as seen in the example below.

entrée V4 SQL Change Food Show Order



Create Food Show Order

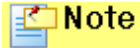


4. Enter the **Order Date**.

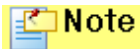
This date is an important value for a Food Show Order because the application of Food Show Promotions is controlled by the *total* quantity ordered for the item (regardless of the schedule) and the **Order Date**.

5. **Customer Information:** Since this is not an actual order the customer address information is presented here for reference only. There is no provision for editing the customer's shipping address because that is ultimately controlled by the individual invoices on which the product actually ships.6. Enter the **P. O. Number**.

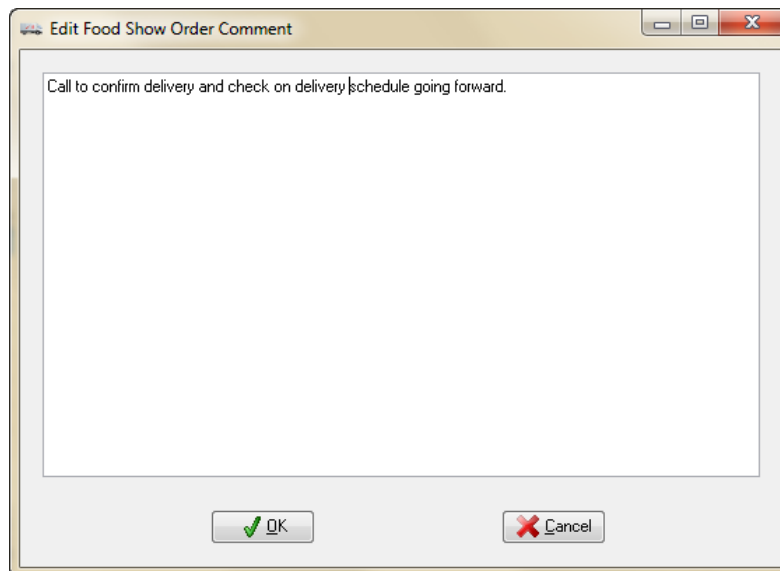
If the customer wishes to specify a Purchase Order for this Food Show Order you may enter it here.

**Note**

The **P. O. Number** value does not automatically carry over to the invoice(s) on which this product ships. This is another issue which relates to the extended period of time during which a Food Show Order may be active. If a situation arose where a single invoice included product from two (or more) different Food Show Orders, perhaps each one having its own Customer P.O. Number, it would be a difficult situation for entrée to handle. As a result, any Purchase Order that the customer assigns will only be directly attached to the Food Show Order.

7. Use the **Add** and **Delete** buttons to add and remove line items. The green plus **+ Add** button will prompt you to enter the **Item Number** through an input field in the edit grid a normal **entrée** procedure.**Note**

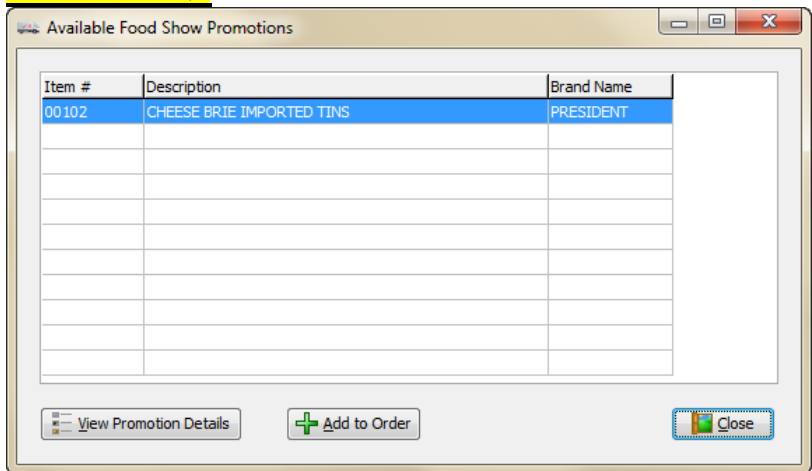
When entering items please remember that duplicate items are not accepted on a Food Show Order.

8. Click the **Edit Comments** button to attach free-form text to the Food Show Order document.**Note**

As with the **Customer P.O. Number**, however, there are potential problems when trying to automatically carry this information over to an invoice so any comments entered here will only be directly attached to the Food Show Order.

9. Click the **Food Show Items** button to view all of the Food Show Promotions that are available to the current customer.

entrée V4 SQL



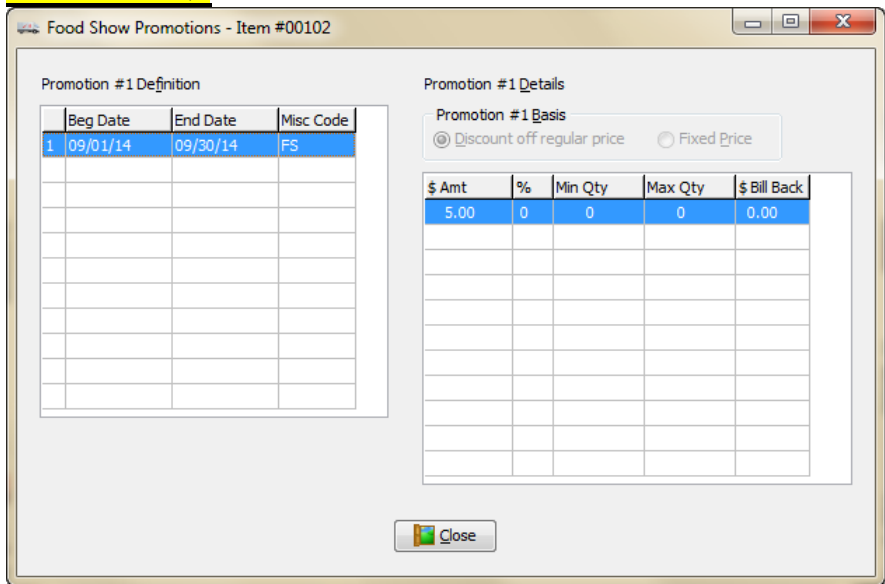
- 10. The **Available Food Show Promotions** dialog box will display the eligible promotions.
- 11. Add items to the Food Show Order: To select an item for addition to a Food Show Order double-click the item or highlight the item and click the **Add To Order** button. It functions similar to the **Sale Items** feature in **Create/Change Invoice**.

Note

Remember that the quantity of product which the customer orders plays a significant part in deciding which promotion, if any, a particular item might receive. So the fact that an item shows up on this list does not necessarily mean that they are eligible for a promotion on any quantity.

- 12. To see how a particular promotion is defined select an **Item** in the **Available Food Show Promotions** dialog box and click the **View Promotion Details** button.
 - The **Food Show Promotions** dialog box will display with all the information about the promotion for that item. Now you can work with the customer to choose an appropriate order quantity to receive the promotion. The **Food Show Promotions** dialog box is shown below.

entrée V4 SQL



The **Food Show Promotions** dialog box above uses the same layout for maintaining the promotion definitions from **Inventory File Maintenance**. The information is displayed in a "read only" mode here. For our test item we see that the promotion only applies to quantities of 50 or less. So even though a promotion is defined for the item, the customer is not eligible for any kind of a promotion if they order more than 50. This may not be an especially realistic scenario but it illustrates the point - quantity is a factor in deciding whether or not an item is eligible for a promotion.

13. **Adding Items to the Food Show Order:** Once you enter the **Item Number** or choose it from the **Available Food Show Promotions** list you will be asked to provide the details for the item in the **Edit Food Show Item** dialog box.

entrée V4 SQL

Item Number: 00102
Description: CHEESE BRIE IMPORTED TINS
Total Order Quantity: 4 Quantity To Be Scheduled: 0

Delivery Schedule
Deliver: 1 every 3 weeks
starting: 09/02/14

Date	Qty
09/02/14	1
09/23/14	1
10/14/14	1
11/04/14	1

Buttons: OK, Cancel, Apply

14. In **Edit Food Show Item** enter a number for the **Total Order Quantity** value representing what the customer wishes to purchase.

- **About Total Order Quantity** - It is the value which is used to select the appropriate Food Show Promotion and, if applicable, the appropriate quantity break.

When the **Quantity To Be Scheduled** value is in **red** this indicates that some part of the specified **Total Order Quantity** is not represented in the **Delivery Schedule**.

entrée V3

Item Number: 10117
Description: CHICKEN STRIPS BREADED
Total Order Quantity: 5 Quantity To Be Scheduled: 5

Delivery Schedule
Deliver: 0 every 1 week
starting: 09/03/14

Date	Qty

Buttons: OK, Cancel, Apply

During editing of the **Delivery Schedule** the **Quantity To Be Scheduled** field is the only indicator of a discrepancy between the **Total Order Quantity** value that you have supplied and the total quantity represented in the **Deliver** field of the **Delivery Schedule**.

If you try to save the item when you have this problem you will be required to reconcile the difference by either editing the delivery schedule or changing Total Quantity Ordered to match the schedule.

15. Next enter the **Date** and **Qty** in **Edit Food Show Item** in the lower right edit grid.

Here you will specify the delivery schedule for the item and you may enter as many individual deliveries as necessary. Keep in mind that the quantity you enter here is intended to specify the customer's requirement for an entire week. At the time of delivery the specified quantity may be divided over two or more different invoices (half on Tuesday and half on Friday, for example) so it is not strictly necessary to specify the actual delivery schedule in detail but you can if you wish to do so.

If the customer's desired delivery schedule can be expressed in simple terms, such as "10 per week starting June 14th", you can save time by using the **Schedule Generator** tool in the **Delivery Schedule** section.



Example To set up this example you would enter the Delivery Schedule information as shown in the image on the right.

Delivery Schedule

Deliver every week

starting

- When you click the **Apply** button **entrée** will automatically build the schedule for you.
- You could use this feature to build out an approximate schedule. Then manually edit the schedule to match the customer's exact delivery schedule requirements. See the example that follows.

Date	Qty
06/14/10	10
06/21/10	10
06/28/10	10
07/05/10	10
07/12/10	10



Example You could generate the schedule shown above and then edit the last two deliveries to delay them by a week.

06/28/10	10
07/05/10	10
07/19/10	10

Just be aware that entrée will not accept duplicate **Due Date** values so, in this case, you could start from the

bottom since delaying the 7/5 delivery would collide with the existing 7/12 delivery.

- With two quick edits the resulting Delivery Schedule would now look like this.
- Your ability to edit the delivery schedule is not limited strictly to the **Due Dates**.
- You are also able to edit the individual delivery quantities as well.

You do not need to type the whole thing by hand if you use the Schedule Generator tool. Here is how it works:

- Enter the **Delivery Schedule** section information, **Deliver, every # week** and **starting** date values.
- Click **Apply** and the schedule is generated in the grid on the right.
- Click **OK** to save the delivery schedule.

Date	Qty
06/14/10	10
06/21/10	10
06/28/10	10
07/12/10	10
07/19/10	10

Fulfilling Deliveries & Food Show Order Changes

Once you start fulfilling the deliveries on a Food Show Order your ability to change individual deliveries will change depending on the current state of each delivery.

entrée V3

Use menu path: **Invoicing > Food Show Orders > Change Order.**

entrée V4 SQL

Go to the **Add-Ons** ribbon menu > **entrée.FS** drop down menu > **Change Order.**



Example If 5 have been shipped against the 6/14 delivery then you will no longer be allowed to change the **Due Date** of the delivery at all (a requirement for the order-fulfillment system to work).

- You may change the **Quantity** up or down as necessary but you will not be allowed to set it to anything less than the quantity which has already been filled.
- So that would mean that we would not be allowed to set **Quantity** to anything less than 5.
- Once a line item has been completely fulfilled then you will not be allowed to change it at all.
- If your schedule correctly covers the entire **Total Quantity** value then the **Quantity To Be Scheduled** field will be zero and will change to the color of a "read only" control.
- If the total individual quantities of your specified delivery schedule should exceed the **Total Quantity** value then "**To Be Scheduled**" will be in green with the amount of the overage shown as a negative number.
- When you click **OK** to save the item's delivery schedule the system will select the Food Show Promotion and quantity break which apply to the item and add it to the order.

Quantity To Be Scheduled

Quantity To Be Scheduled



Item #	UOM	Description	Order Qty
00075	CASE	GRILL GOURMET CHIC.BREASTS 1/10#	50

- Keep in mind that, by definition, an item must be eligible for a **Food Show Promotion** before it can appear on a Food Show Order. If, in the case of our example item, we had tried to order a total of 55 units the system would have displayed the **No Promotion** message box saying:

"No Food Show Promotion is available for this item using the current order quantity. You must either change the order quantity to match up with an available promotion or else the item will be deleted.

Do you wish to edit the item?"

- If you answer **Yes**, then you would be taken back to the item **Edit Food Show Item** dialog to make whatever adjustments were necessary to match the order with a valid promotion.
- If you answered **No** then the item would be removed from the order.

Printing a Food Show Order Document

Printing uses a simple layout which is based on the Sales Order document.

entrée V3

Use menu path: **Invoicing** > **Food Show Orders** > **Print Order**.

entrée V4 SQL

Go to the **Add-Ons** ribbon menu > **entrée.FS** drop down menu > **Print Order**.

- In addition to listing the various items and the total quantity ordered for each, the Food Show Order document will show the promotion for which the item qualified as well as listing the individual due dates and quantities of the item's delivery schedule.



Example A printed Food Show order is displayed below with the Delivery Schedule and Food Show Discount unit price information printed on the order.

```

*****
                          Madison Distribution
                          168 BOSTON POST RD MADISON CT, 06443 (203) 245-3999
*****
                                                    =====
                                                    ORDER NO.
                                                    -----
FOOD SHOW ORDER                                                    2 Rev. 1
                                                    =====

=====
ORDER DATE   PURCHASE ORDER NO.
-----
09/02/14     4587312
=====

SOLD TO: AIRLINE DRIVE INN THEATRE
          TEICHER THEATERS
          PO BOX 5410
          SUN CITY CENTER, FL 33571
          ALEN
          (815) 938-1081
=====

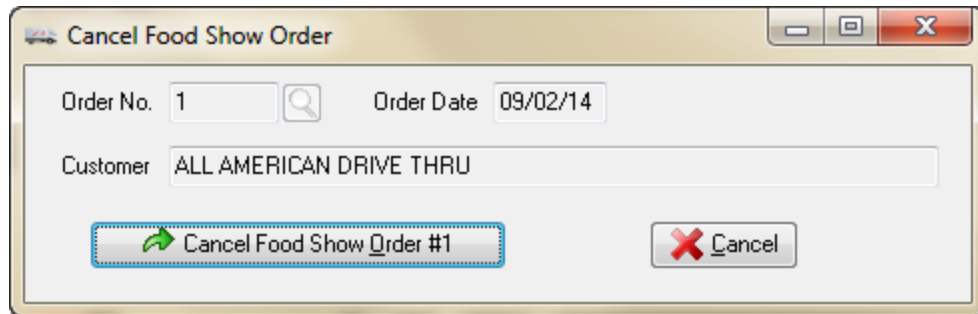
Item #      UOM      Description                      Brand Name  Qty.
=====
00102      CASE      CHEESE BRIE IMPORTED TINS          PRESIDENT   4
          ***FOOD SHOW DISCOUNT: $5.00 off your regular Unit Price

          09/02 -      1  09/23 -      1  10/14 -      1  11/04 -      1

```

Canceling a Food Show Order

There is a utility to cancel Food Show orders and it works in the same way as the **Cancel Invoice** utility.



entrée V3

Use menu path: **Invoicing > Food Show Orders > Cancel Order.**

entrée V4 SQL

Go to the **Add-Ons** ribbon menu > **entrée.FS** drop down menu > **Cancel Order.**

Just be aware that you will not be allowed to outright cancel a Food Show Order which you have already started fulfilling. At that point your only option will be to edit the items to reflect their current fulfillment state so that the order appears "**complete**".

About Food Show Orders & Order Completion

Because there is an ongoing interaction between Food Show Orders and Invoices there isn't really a point at which a Food Show Order is explicitly marked as "**complete**" so that it can be moved into History. As a result the **Close Period** utility looks at two key indicators to determine the current status of a given order.

First it looks to see if all of the quantities on the order have been filled in full. If so then the order is moved into History. However, to avoid a situation where the system keeps holding on to a Food Show Order that, for whatever reason, will never be filled completely there is a backup test which looks at the age of the Food Show Order. Specifically, it looks at the most recent date in the order's delivery schedules and, if the order is still incomplete 90 days after the last scheduled delivery, then the order is moved to History despite being incomplete.

7.2 Invoicing and Food Show Orders

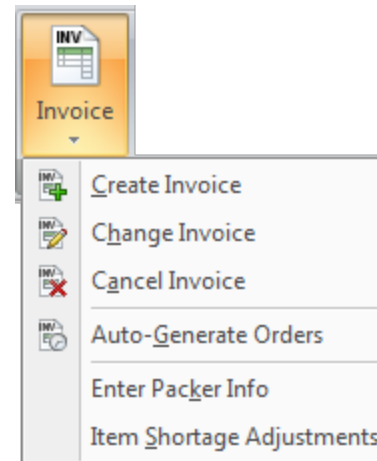
In addition to documenting the details of the customer's order, including the promotion amounts for which they are eligible, the Food Show Order also performs a valuable role in fulfilling the order. The **entrée Invoicing** system has been updated to be aware of Food Show Orders so that any time you are creating or changing an Invoice, the system also looks to see if the "**Ship To**" customer has any unfilled Food Show Order deliveries that are due during that week. Using Invoice Date as a basis, **entrée** looks at the customer's open Food Show Order deliveries and all deliveries dated in the same Monday-to-Sunday period are considered to be "due".

entrée V3

1a. Use menu path: **Invoicing > Create Invoice**.

entrée V4 SQL

1b. Go to the **Customer** ribbon menu > **Invoice** drop down menu > **Create Invoice**.



2. After you find the customer if the customer has unfilled Food Show deliveries the **Food Show Orders** button will be enabled in **Create Invoice** indicating the delivery schedule status needs to be checked.

3. Click the **Food Show Orders** to display the **Food Show Order Items** dialog.

entrée V4 SQL

Order #	Item #	Description	Date Due	Tot Ord	Tot Filled	Qty to Fill
2	00102	CHEESE BRIE IMPORTED TINS	09/02/14	1	0	1

Promotion Description for Item #00102 on Order #2
\$5.00 off the regular Unit Price

4. Check the box on the right to add Food Show items to the current invoice.

- Just be aware that if Food Show deliveries are due, but all of them are currently filled in full, then the **Food Show Orders** button will be enabled but the item selection list will be empty.
- You may add as many or as few of these items as you wish (including none). So, rather than just forcing the customer to take all of their Food Show items in one single delivery, it is left between the customer and the order taker to work out exactly how the customer will take the products and quantities for which they have contracted.
- When you check the box to mark an item for addition the **Qty to Fill** value in the next column automatically defaults to the quantity that is currently unfilled on the item. This value can be edited as necessary and can even be changed to an amount greater than what is due in the current week. If, for instance, the customer typically places two orders in the course of a week then you can partially fill one or more deliveries on the first order and then fill the remaining balances of the deliveries on their second order.
- **Things to know about choosing the quantity to fill on a given delivery.**
 - First, unfilled deliveries from previous weeks are **not** automatically carried into subsequent weeks.
 - Secondly, over shipping a delivery does **not** reduce the customers obligation in later weeks (the additional quantity is added to the item's Total Quantity value).
 - Third, correctly increasing or decreasing the quantity on a Food Show delivery requires explicitly changing the delivery schedule on the original Food Show Order to match the updated requirement.

5. Once you have selected all of the items to be added and specified the desired quantity for each, click **OK**. Each of the chosen items will be added to the invoice with the specified quantity.

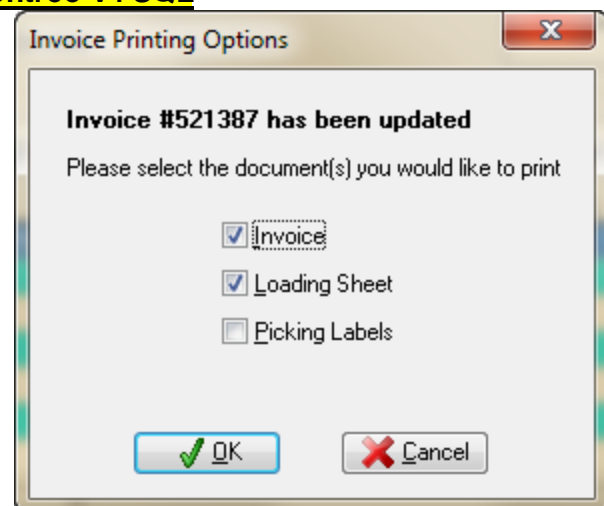
entrée V4 SQL

The screenshot shows a software interface for processing an invoice. At the top, there are navigation buttons: Add, Delete, Edit Mode, Invoice, Lot Info, Weight, COOL, Prior Sales, Sale Items, Substitutes, Find Item, and GP Info. Below this is a table with columns: Item #, UOM, Brand Name, Description, Pack Size, Order Qty, Ship Qty, Ship Wgt, Unit Price, and Extended Amt. The first row contains: 00102, CASE, PRESIDENT, CHEESE BRIE IMPORTED TINS, 12/4.5OZ, 1, 1, 3.5000, 35.6100, 35.61. Below the table is a detailed view for 'Line: 2 of 2'. It includes fields for On Order, Base, Dot Lead Time, Seq. #, OH Quantity, Item Profit, Item Whse Loc, Brand, OH Weight, Level 1, Unit Profit, Pack, Last Sale, Level 2, Last Sale 1, Pieces per Case, Last Qty, Level 3, Last Price 1, Last Price, Dot Item Type, and Item Profit % 1. At the bottom, there are summary fields: Thursday, Total Cases: 1, Total Weight: 3.50, Total Cubes: 0, Total Profit: \$8.19/23.00%, Tax Total: \$0.00, Promo Total: \$5.00, and Invoice Total: \$35.61.

- Using this process to fill the Food Show items establishes a permanent link between the invoice item and the original Food Show Order line item.
 - **The reason:** If the quantity ordered on the invoice is not what actually gets shipped, the "Total Filled" value of the Food Show item can be adjusted appropriately. So if we originally indicated that we were going to fill the entire requirement on our example item then it would be shown as "filled".

- If later it was determined that only 5 would actually be shipped, then "**Total Filled**" would be adjusted to 5 and the delivery would again be shown as "**incomplete**" with the **Food Show Order Items** dialog **Qty to Fill** column set to zero.
 - This linkage between the invoice item and the original Food Show Order line item is maintained throughout the life of the invoice so that even if the adjustment is made outside of **Create/Change Invoice** (say in Item Shortage Adjustment) the status of the Food Show item is still updated as necessary.
6. The **Create Invoice** process monitors the Food Show Order feature to assist your order takers to make sure they have correctly processed all pending Food Show Order deliveries.
- If the system has found unfilled Food Show Orders for the week, but the order taker has never accessed the "**Food Show Order Items**" dialog during entry of the current invoice, then when they save the invoice a **Reminder** warning message box will be displayed saying;

"Reminder Customer #000 has unfilled Food Show Orders and you have not reviewed those orders. Do you wish to continue saving?"
 - Since we are ultimately leaving the fulfillment of the Food Show Orders in the hands of the order takers this is only a reminder message and maybe the order taker and the customer have already agreed that the Food Show product will be delivered on a later invoice.
 - To prevent this reminder message from becoming a complete annoyance, this check is only performed in **Create Invoice** not in **Change Invoice**.
 - Click **Yes** in the **Reminder** message box to continue with saving the invoice.
7. If the invoice has been completed with all the customer's items ordered click **OK** on the Create Invoice screen.
8. After the **OK** is clicked, the **entrée** invoicing system begins the save process. Depending on how your system is configured you may be presented with one or more prompts. These prompts will be the normal ones you see while processing invoices on a daily basis.
- If **entrée** system option #11 is enabled, the **Invoice Printing Options** dialog will be displayed allowing you to print various documents for the invoice.

entrée V4 SQL



Chapter 8

Tracking Food Show Orders

8 Tracking Food Show Orders

8.1 The Review Order Utility

Since many aspects of the fulfillment of Food Show Orders are either automatic (updating a Food Show item for a short-shipped invoice item) or can be handled by any or all of your order taker staff (adding items to invoices and specifying appropriate quantities), keeping track of your Food Show Orders can be difficult. To help with the overall management of your Food Show Orders we have provided the **Review Orders** utility which allows you to look at individual Food Show Orders in detail or just take a quick overview of the orders for a specific customer.

Finding Food Show Orders

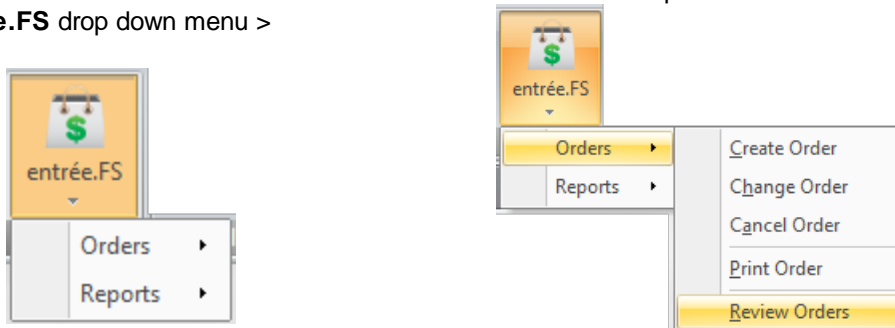
entrée V3

1a. Use menu path: **Invoicing > Food Show Orders > Review Orders.**

Order #	Ord Dt	Customer P.O. #	Prt?	# Prt	Status
1	09/03/14	4870021	No	0	Incomplete

entrée V4 SQL

1b. Go to the **Add-Ons** ribbon menu > Then select the **Orders** drop down menu > **Review Orders.**
entrée.FS drop down menu >



entrée V4 SQL

Review Food Show Orders

Review Single Order

Order Number

Review Orders for Customer

Customer Number

Include History Orders
 Show Order Status


Order #	Ord Dt	Customer P.O. #	Prt?	# Prt	Status
2	09/02/14	4587312	No	0	Incomplete

The **Review Order** utility is split into two separate sections.

- The **Review Single Order** section for looking up specific orders.
- The **Review Orders for Customer** section which compiles a list of all the Food Show Orders for a specific customer.

2a. You can either type in the **Order Number** you're interested in seeing (if you know it) or you can use the search feature to locate it.

Or

- 2b. Enter the **Customer Number** or use the Customer Search  feature (below) to show all of the orders on file for that customer.

entrée V4 SQL

Customer Search

Match Contains

Cust #	Company	Misc. Code	Address 1	City
FUN829	1 FUN FARM, LLCQ	M	8291 W ST. RD 1	FARMLAND
FLA200	2001 FLAVORS	CR	8537 TRAIL LAKE DR	POWELL
120820	40/8 AMERICAN LEGION		325 N OHIO ST	GREENVILLE
55EXPR	55 EXPRESS		503 E STAUNTON RD	TROY
105201	82 CRAFT CLUB BOB EVANS		PO BOX 501	EATON
AAB939	A & A BAR & GRILL		939 N. KEOWEE STREET	DAYTON
000010	A & B CAFE		110 N MAIN ST	WINCHESTER
AAP110	AAP ST. MARY'S CORP.		1100 MCKINLEY ROAD	ST. MARY'S
001473	AIRLINE DRIVE INN THEATRE		TEICHER THEATERS	SUN CITY CENTER
ALS140	AL'S PIZZA- TROY		14044 MERANDA RD	ANNA
003719	AL'S PLACE- FT LORAMIE	FS	9900 ST RT 66	FORT LORAMIE
ALL250	ALL AMERICAN DRIVE THRU		2505 PARSONS AVE	COLUMBUS

2108 total recs

Call - Mon:	07:30AM	Route - Wed:		Stop - Fri:		Price Level:	2
Call - Tue:		Route - Thu:	00008	Last Pay Amt:	\$192.17	Payment Terms:	NET 7 DAYS
Call - Wed:	01:00PM	Route - Fri:		Last Pay Date:	11/06/12	Credit Limit:	\$4,500.00
Call - Thu:		Stop - Mon:		Last Sale Date:	07/03/14	Balance:	\$946.70
Call - Fri:		Stop - Tue:	150	Industry:	ICE	Salesperson:	55
Route - Mon:		Stop - Wed:		Territory:		Inactive:	No
Route - Tue:	00008	Stop - Thu:	200	Bill #:			

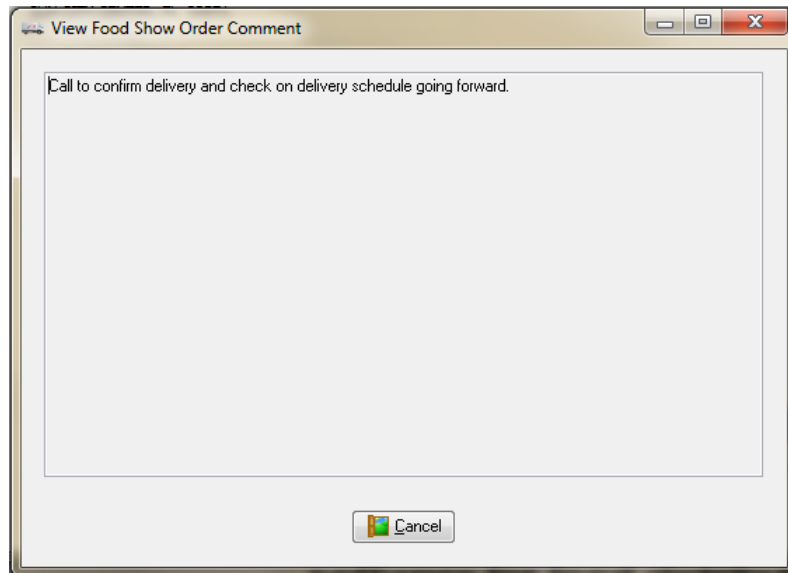
OK Cancel Refresh

- This will retrieve the entire list of Food Show Orders for that specific customer in the "Current" data files.
- Check the **Include History Orders** option box if you also wish to view Orders that have been moved into History. Retrieving a customer's entire history might take time so this option defaults to "off".
- Check the **Show Order Status** option box to review the item detail for all of the customer's Food Show Orders and to determine the current status of the overall order. Reviewing the item detail for all of a customer's orders can take time so this option also defaults to "off".

If you enable this option then a new **Status** column is added (shown in the V4 image in step 1b) to the display grid indicating the result of the system's review of the orders. In this case, of course, we've only just started filling our test order and so it naturally shows up here as **Incomplete**.

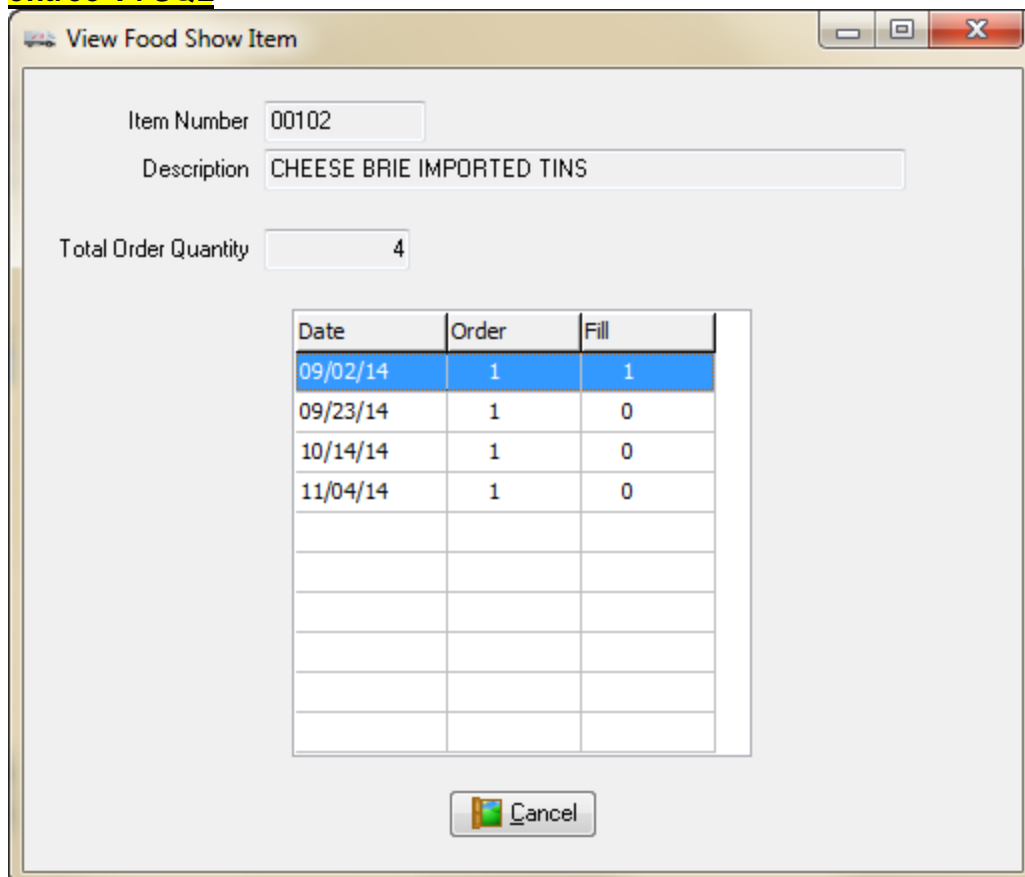
- Double-clicking an entry in this list takes you into the order itself just like the **Review Single Order** option.
- Once you've selected the order the basic summary information will be presented in the **Review Food Show Order** screen.

Use the **View Comments** button to read any comments on the order. If the **View Comments** button is disabled it means there are no comments with this order.



7. If you double click an item the **View Food Show Item** screen will display. You can see the entire delivery schedule for the item as well as its current fulfillment status.

entrée V4 SQL





Chapter 9

Food Show Order Reports

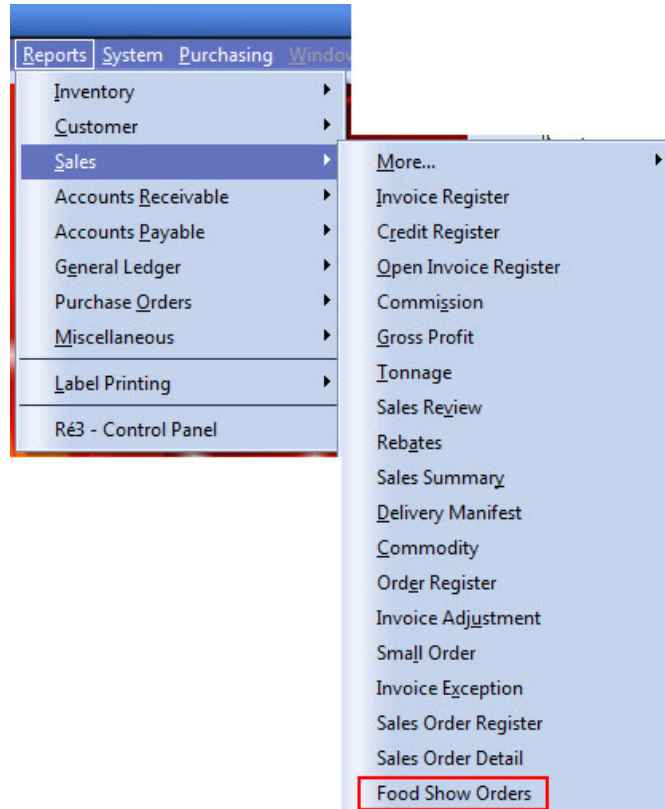
9 Food Show Order Reports

In addition to the interactive Review process, we have also provided the **Food Show Orders Report** that will give you more of an overview of your Food Show orders.

entrée V3

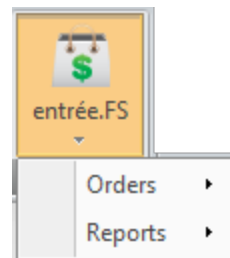
Use menu path:

Reports > Sales > Food Show Orders.



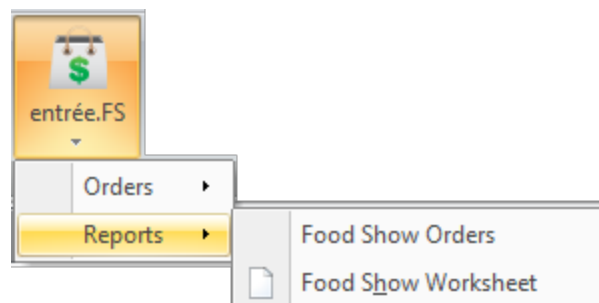
entrée V4 SQL

Go to the **Add-Ons** ribbon menu > **entrée.FS** drop down menu.



Click the **Reports** drop down menu and select from **Food Show Orders** or **Food Show Worksheet**.

The chosen report's initial setup dialog will display. It will open in the General tab of the reporting system in your version of **entrée**.



- Below you see the **Food Show Orders** report configuration General tab.

entrée V4 SQL

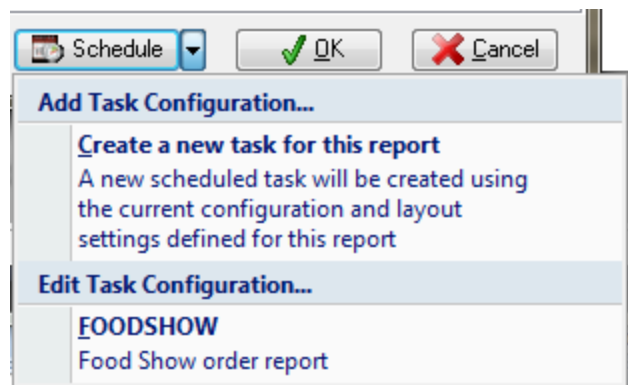
The screenshot shows the 'Food Show Orders' report configuration window with the 'General' tab selected. The window has a ribbon with tabs: General, Filters, Layout, Appearance, Output, Configure, and Preview Layout. The 'Dates' section includes 'Data from: 09/02/14' and 'to: 09/02/14', with a 'Fulfillment Date:' field below. The 'Miscellaneous Options' section has a 'File selection:' dropdown set to 'Current files'. The 'Exclude Options' section has four checkboxes: 'Exclude inactive items' (checked), 'Exclude inactive customers' (checked), 'Exclude non-printed orders' (unchecked), and 'Exclude special order items' (unchecked). The 'Report Options' section has a 'Show Fulfillment Detail' checkbox (checked) and a 'Show for:' dropdown menu with options: 'All', 'Open', 'Filled', and 'To Fill By'. At the bottom, there is a 'Return to report setup after generating report' checkbox (unchecked) and a 'Schedule' dropdown menu. The bottom right corner has 'OK' and 'Cancel' buttons.

- **Schedule** (This feature is only available in **entrée V4 SQL**.)

The main Scheduling Utility feature can be accessed in the System Utilities section of the System ribbon menu.

The Schedule drop down menu in the report system lists options available using the Task Configuration features of the Scheduling Utility.

- **Add Task Configuration**
This option is used to create a new report configuration that will run as a task in job scheduler.
- **Edit Task Configuration**
Used to edit saved report configurations.



Edit Task Configuration opens the **Task Properties** dialog for the saved report's task configuration. Here you see our test "FOODSHOW" task configuration for a Food Show Orders report.

The screenshot shows the 'Task Properties...' dialog box for a task named 'FOODSHOW'. The dialog is organized into several sections:

- Task Reference:** A text box containing 'FOODSHOW' and a small icon.
- Description:** A text box containing 'Food Show order report'.
- Task Type:** A dropdown menu set to 'Report'.
- Category:** A dropdown menu set to 'Sales Reports'.
- Option:** A dropdown menu set to 'Food Show Orders'.
- Execution Options:**
 - Priority:** A dropdown menu set to 'Any'.
 - Executed by:** A dropdown menu set to 'FRANCES-PC'.
 - Delay:** A numeric spinner set to '0'.
 - Execute task using an alternate user account:** A dropdown menu set to 'ADMIN'.
- Schedule:**
 - Run at:** A time spinner set to '05:00 PM'.
 - Cycle:** A dropdown menu set to 'Daily'.
 - Days:** A grid of checkboxes for days of the week: Monday, Tuesday (checked), Wednesday, Thursday, Friday, Saturday, and Sunday.
 - Select:** A button with a calendar icon.
- Report Configuration:** A dropdown menu set to 'Use Custom' and an empty text box.

At the bottom of the dialog, there are three buttons: 'Configure' (with a gear icon), 'Notifications' (with a speech bubble icon), and 'OK' (with a green checkmark icon). To the right of the 'OK' button is a 'Cancel' button (with a red X icon).

Hot Tip! For more information about the Scheduling Utility, Task Configurations and the **Ré4 Control Panel** see the [Accessing System Guides](#) section of this guide for the link to the **entrée version 4 SQL System Guide** and review these topics.

General Tab Options

Most of these General tab options are self-explanatory and are available on many **entrée system** reports. Make your selections for the following options.

- **Dates**

Report dates may be entered directly without the separator slashes or by clicking the drop-down button, which opens a calendar style date picker.

- **File Selection**

The File selection field will allow you to specify which data files are examined when extracting the data for the report.

- **Current Files**

Only data residing in the current files (periods that have not been closed) will be used.

- **History Files**

Only data residing in the history files (periods that have been closed) will be used.

- **Use all available data**

BOTH the current and history files will be used. (this method will take the longest to generate).

The screenshot shows the 'Food Show Orders' report configuration window. The 'General' tab is selected. The 'Dates' section has 'Data from: 09/02/14' and 'to: 09/02/14'. The 'Miscellaneous Options' section has 'File selection:' with a dropdown menu open, showing 'Current files' (selected), 'History files', and 'Use all available data'. The 'Exclude Options' section has four checkboxes: 'Exclude inactive items' (checked), 'Exclude inactive customers' (checked), 'Exclude non-printed orders' (unchecked), and 'Exclude special order items' (unchecked).

- **Exclude Options**

The exclude options are another means to filter the amount of data that is displayed on the report. These options will vary and are offered for the specific report.

- **Report Options - Show Fulfillment Detail**

This option is specific to the Food Show Orders report. When you enable the option by checking the box next to **Show Fulfillment Detail** you have four variations to choose from.

- **"All"** option simply lists the entire delivery schedule.
- **"Open"** options lists only deliveries that have not been filled in full.
- **"Filled"** option does just the opposite and shows only deliveries that *have* been filled in full.
- **"To Fill By"** option which allows you to look at all unfilled deliveries that are due before a certain date.

When you choose the **"To Fill By"** option you get a date-entry field which allows you to specify the cutoff date. Since Food Show Orders do not affect inventory until the deliveries are actually added to an invoice, this view of your pending orders will allow you to monitor upcoming inventory requirements to fill those orders.

- See examples on the following page.



Example Default Food Show Order report layout showing deliveries due on or before 7/2. We see the item, and a brief summary of the Food Show Promotion terms. Then we see a listing of the individual Due Dates (limited to 7/2) showing the original Quantity Ordered value as well as the current Quantity Filled. Our 6/14 delivery shows the 5 that we have filled so far.

Order Number	Revision Number	Order Date	Item Number	Description Line 1	Total Filled	Billback Amount	Promotion Descrip.	Promo Start	Promo End
Customer Number: 000 - PPC Foods Mfg. & Production									
1	0	06/07/10	00075	GRILL GOURMET CHIC	5.00	0.00	\$0.45 off	06/01/10	06/30/10
Due Date: 06/14/10			Qty Ord: 10.00	Qty Filled: 5.00					
Due Date: 06/21/10			Qty Ord: 10.00	Qty Filled: 0.00					
Due Date: 06/28/10			Qty Ord: 10.00	Qty Filled: 0.00					



Example Food Show Order report with the **Show Fulfillment Detail** option set to **All**.

Order Number	Revision Number	Order Date	Item Number	Description Line 1	Total Filled	Billback Amount	Promotion Descrip.	Promo Start	Promo End
Date: 09/04/14 Madison Distribution Page: 1 Time: 11:01 AM Food Show Orders Covers Period: Sep 01 2014 - Sep 04 2014									
Customer Number: 001473 - AIRLINE DRIVE INN THEATRE									
2	1	09/02/14	00102	CHEESE BRIE IMPORTED	1.00	0.00	\$5.00 off	09/01/14	09/30/14
Due Date: 09/02/14			Qty Ord: 1.00	Qty Filled: 1.00					
Due Date: 09/23/14			Qty Ord: 1.00	Qty Filled: 0.00					
Due Date: 10/14/14			Qty Ord: 1.00	Qty Filled: 0.00					
Due Date: 11/04/14			Qty Ord: 1.00	Qty Filled: 0.00					
001473 - AIRLINE DRIVE INN THEATRE Sub-Totals:									
2	1				1.00	0.00			
Customer Number: BRO203 - BROADWAY CAFE`									
3	0	09/03/14	00102	CHEESE BRIE IMPORTED	0.00	0.00	\$5.00 off	09/01/14	09/30/14
Due Date: 09/02/14			Qty Ord: 10.00	Qty Filled: 0.00					
Due Date: 09/23/14			Qty Ord: 10.00	Qty Filled: 0.00					
Due Date: 10/14/14			Qty Ord: 10.00	Qty Filled: 0.00					
Due Date: 11/04/14			Qty Ord: 10.00	Qty Filled: 0.00					
Due Date: 11/11/14			Qty Ord: 10.00	Qty Filled: 0.00					
BRO203 - BROADWAY CAFE` Sub-Totals:									
3	0				0.00	0.00			
Report Totals:									
5	1				1.00	0.00			

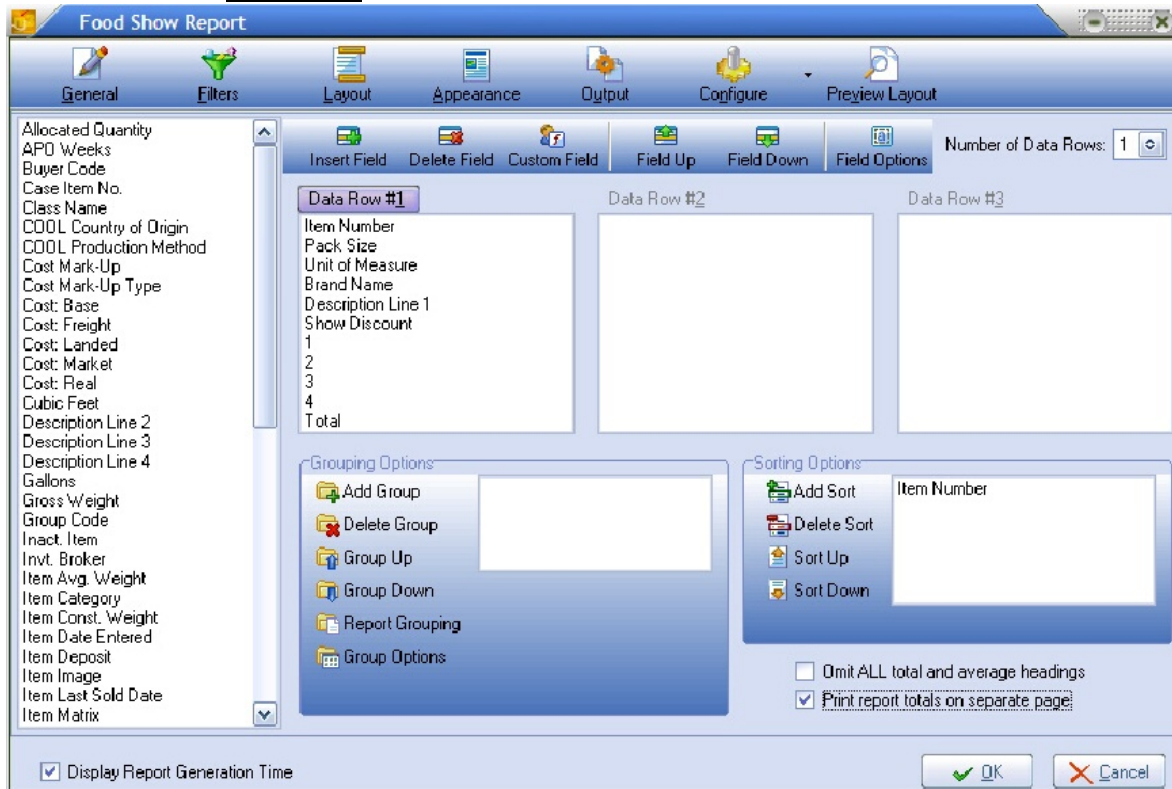


Hot Tip! For additional information about the tools and filters see [entrée version 3 Reports Ré3 Overview](#) or the [entrée version 4 SQL Ré4 Control Panel](#) in the [entrée System Guide](#). See the [Accessing System Guides](#) section of this guide for links.

Example entrée V3 Food Show Report Appearance, Filters and Layout screens follow.

Example entrée V3 Food Show Report Filters screen:

 **Example** **entrée V3** Food Show Report **Layout** screen:



Food Show Report

General Filters Layout Appearance Output Configure Preview Layout

Insert Field Delete Field Custom Field Field Up Field Down Field Options Number of Data Rows: 1

Data Row #1 **Data Row #2** **Data Row #3**

Item Number
Pack Size
Unit of Measure
Brand Name
Description Line 1
Show Discount
1
2
3
4
Total

Grouping Options:

- Add Group
- Delete Group
- Group Up
- Group Down
- Report Grouping
- Group Options

Sorting Options:

- Add Sort
- Delete Sort
- Sort Up
- Sort Down

Item Number

Omit ALL total and average headings
 Print report totals on separate page

Display Report Generation Time

OK Cancel

Food Show Worksheet Report

entrée V4 SQL General Tab Options



Example The default **Food Show Worksheet** layout.

Date: 09/02/14
Time: 10:31 AM

Madison Distribution
Report Name: Food Show Report

Page: 1

Item Number	Pack Size	Unit of Measure	Brand Name	Description Line 1	Show Discount	1	2	3	4	Total
XXXXXXXX	XXXXXXXXXX	XXXX	XXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXX	XXXXX	XX	XX	XX	XX	XXXX
XXXXXXXX	XXXXXXXXXX	XXXX	XXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXX	XXXXX	XX	XX	XX	XX	XXXX

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