entrée.NET

Software for the Food Distribution Industry

System Administrator's Guide

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Contact NECS

1 Contact NECS

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SOFTWARE FOR FOOD DISTRIBUTORS

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Chapter 2

License Agreement

2 License Agreement

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Updated September 2016

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Legal Notices

Chapter 3

Overview / Installation

3 Overview / Installation

The **entrée.NET** system is specialized e-commerce software running on high capacity cloud based servers to always ensure the system is available and performing at top speed. For security and other issues, it does not allow a user to directly access your local server. Instead **entrée.NET** communicates directly with the local server in your office for such things as accessing inventory information and downloading customer orders. All the activity such as when a user creates an order is saved on the **entrée.NET** cloud servers as the order is built. So if for some reason the user looses Internet access, no data will be lost. The customer or DSR will simply log back in and continue where they left off.

The **entrée.NET** system was created primarily for Internet based order entry by your customers and DSRs. It was designed to speed the user through the order entry process while helping them identify items they should be ordering but may have missed, locate items in your product catalog and discover your current "specials" and other items on sale or featured. They can view extensive information about each item including extended descriptions, images, available pack sizes, etc. Your product catalog can be viewed using "Tags" such as Kosher, Gluten Free, Fat Free, Peanut Free, etc. Customizable reports can be generated based on up to 13 months of purchase history including exporting to Excel or PDF documents. Customers can view their accounts receivable status, including open invoices and payments. If you use our **entrée.DOC** software, they can view and print their scanned invoices showing their signature.

If you have your own domain name (ex: myfooddistributingcompany.com) and would like a modern and professional looking site for your business, this can also be accomplished with **entrée.NET**. NECS can help you create your website and give you the ability to maintain it yourself. You'll have the ability to change images, update the content of your "Welcome," "About Us," "Contact," "Blog" and "Directions" pages. You will be able to automatically post your inventory list and specials, from your NECS entrée software, directly to your website, as often as you'd like.

If you currently have a website which you love, **entrée.NET** provides an option for a public Pop-Up Catalog which you can easily integrate into your existing site. This will allow the public to see your product catalog which is automatically updated from your entrée software, so there is never a need to contact a web developer to keep your product catalog updated.

Resources

Access our interactive search-able web-based knowledgebases using the links here.

- **entrée.NET KnowledgeBase** at **http://www.necs.com/net_KB/**
- **entrée V4 SQL KnowledgeBase** at **http://www.necs.com/eV4SQL_KB/**
- **entrée V3 KnowledgeBase** at **http://www.necs.com/knowledgebase/**

entrée.NET Guides

Included with the **entrée.NET** system are customized guides for the **Administrator**, **Administrator Website Only guide, Salesperson, User Guide** (for Customers) and a guide for the **Language Translator**. These guides will answer any questions you, your employees and customers may have in addition to making it easy for you to manage your new online ordering system, catalog, and website.

The **.NET** guides are available as PDF files that you can download via the **Help** tab in **entrée.NET** or from the NECS website using these instructions.

1. In your browser go to **www.necs.com** and click the **Support** option to access the drop down menu.
2. Click **Customer Login** and enter your username and password to access 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 far left click the **System Guides** option.
4. Select **entrée.NET** from the list displayed.
5. The **entrée.NET Product Guides** list will be displayed select the desired guide. The guides can easily be read or printed using the free **Adobe Reader** download.

entrée Versions 3 & 4SQL

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.

entrée.NET System Requirements

- **entrée.NET** requires you to have installed either **entrée version** 3.5.1 or later or **entrée version 4.0**.
- You will need to upgrade to the proper version of **entrée** in order to utilize the data import/export utility.
- **entrée.NET** works with virtually all computers which support Internet connectivity and a Web browser like Internet Explorer, Mozilla Firefox, Apple Safari and Google Chrome.

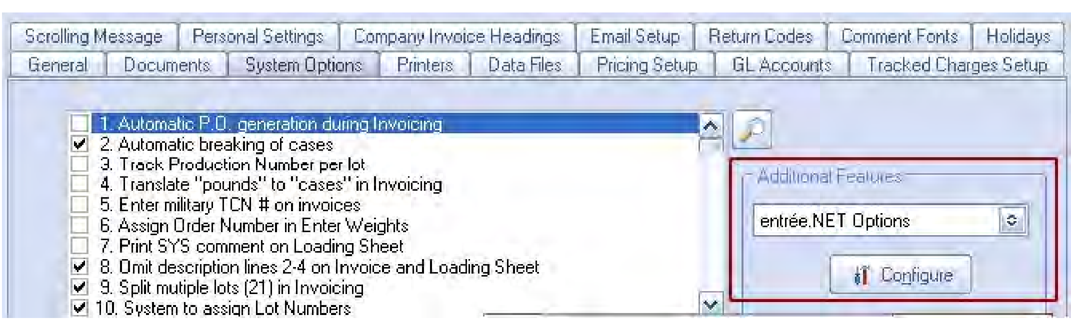
entrée.NET Version

The **About** tab in your **entrée.NET** system provides you with the version number and information about the modules installed with your software. NECS will also provide you with detailed version update notes in the **About** tab. With each release you will know what modifications and enhancements have been made to **entrée.NET**.

entrée.NET Installation Overview

You will need to make these same changes in the main **entrée system** whether you have **entrée version 3** or **entrée V4 SQL.** There are new menu paths using the ribbon menus in **entrée V4.**

entrée V3	**entrée V4 SQL**
1. Login and select **System > Preferences.**	1. Login and go to the **System** ribbon menu and click on the **System Preferences** option.
2. Then click on the **System Options** tab.	2. Click on the **System Options** tab.
3. Go to the **Additional Features** drop down menu on the right and click **entrée.NET options.**	3. Go to the **Additional Features** drop down menu on the right and click **entrée.NET options.**
4. Click the **Configure** button.	4. Click the **Configure** button.

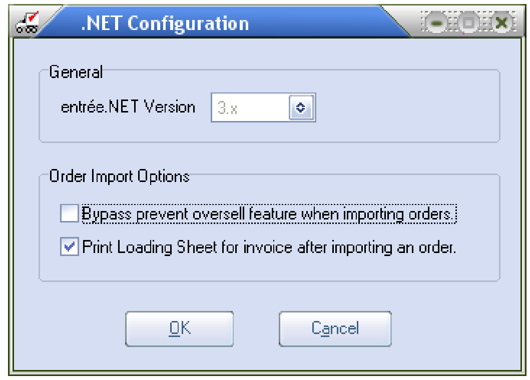


5. The **.NET Configuration** dialog box will display.

Next follow the instructions for the entrée version you are running for steps 6 and 7. Then continue on with steps 8 - 10 for all versions.

entrée V3 .NET Settings

6. **General** section the **entrée.NET Version** will default to 3.x.



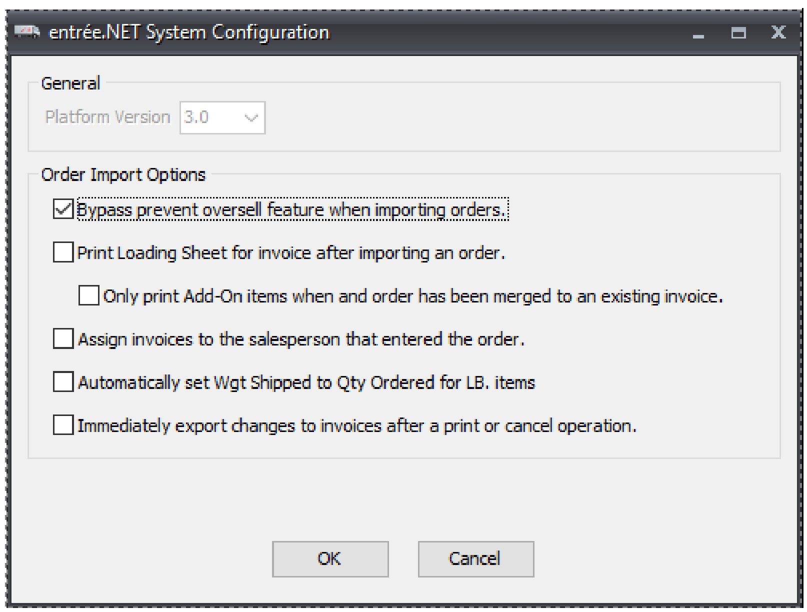
7. **Order Import Options** section options:

- **Bypass prevent oversell feature when importing orders -** If you have System Option # 126 "Prevent OVERSELL of items on Sales Orders" checked in **entrée** System Preferences you may want to switch it off for orders imported from **entrée.NET** by checking this option.

- **Print Loading Sheet for invoice after importing an order -** If you check this box after your orders are imported from **entrée.NET** the loading sheets will be printed automatically.

entrée V4 SQL .NET Settings

6. **General** section allows update of the **entrée.NET Version** by using the drop down menu.



7. **Order Import Options**

The Order Import Options feature was added to support these **entrée** system options:

- **System Option #80** - "Prevent OVERSELL of items".
- **System Option #126** - "Prevent OVERSELL of items on Sales Orders".
- **System Option #128** - "Prevent oversell is allowed to reallocate product".

Order Import Options:

- **Bypass prevent oversell feature when importing orders** - Controls the use of systems options for oversell on orders imported into entrée from **entrée.NET**. Check the box for to activate the option.

- **Print Loading Sheet for invoice after importing an order** - Provides the option to print Loading Sheets when importing the orders from **entrée.NET**. Check the box for to activate the option.

  Once this option has been enabled the Loading Sheet for invoices created from **entrée.NET** orders will automatically be printed to your configured "Loading Sheet" printer as part of the order import process.

- **Assign invoices to the salesperson that entered the order** - This option provides the ability to control which salesperson gets assigned to orders placed through both **entrée.NET** and the **Electronic Order Pad**.

Activating this option will change the order entry process so that the Salesperson ID of the person entering the order will be assigned to that order. The normal behavior of the system is to always assign the salesperson according to the salesperson assigned to the customer in Customer File Maintenance.

- **Automatically set Wgt Shipped to Qty Ordered for LB. items -** This option will set the “Weight Shipped” value for “LB.” items to automatically be set to match the “Quantity Ordered” value during the order import process.

8. Check the boxes for the desired options in the **entrée** version you are running either V3 or V4 SQL.

9. Click **OK** in the **.NET Configuration** dialog box.

10. Click **OK** in **System Preferences**.

Chapter 4

Setting entrée Options

4 Setting entrée Options

Options for **entrée.NET** and the **Electronic Order Pad** in the main **entrée system** are explained in the sections that follow.

- Automatic Order Import Consolidation Feature
- entrée Salesperson File Options
- entrée Inventory File Options
- entrée Customer File Options
- entrée System Options Additional Features

4.1 Automatic Order Import Consolidation Feature

NECS has implemented support for automatically merging orders into existing invoices within the entrée.NET and the Electronic Order Pad order import process in entrée V4.

Note Currently this feature is only active in the order import process for **entrée.NET** and the **Electronic Order Pad**.

Turning it on is easy!

1. The first thing you must do is enable and configure the **Automatic Order Import Consolidation** feature.

- Go to entrée > System ribbon menu > System Preferences > System Options tab > Additional Features menu > select **Order Import Consolidation** > click **Configure** button.
- Then follow the instructions in the entrée System Options section of this chapter.

.2. Next check and update the **entrée.NET Options**.

- Go to the System ribbon menu > System Preferences > System Options tab > click **Additional Features** drop down menu > select **entrée.NET Options** > click **Configure** button.
- Then follow the instructions in the entrée System Options section of this chapter and make any needed changes.

3. Finally update any customers that you want the order import consolidation feature disabled.

- Go to the Customer File > Miscellaneous Tab > Options list > **Import Options**.
- Uncheck the **Allow automatic order consolidation** option to turn off the feature.
- See the entrée Customer File Options section of this chapter.

For examples of invoices using the order import consolidation feature see see the

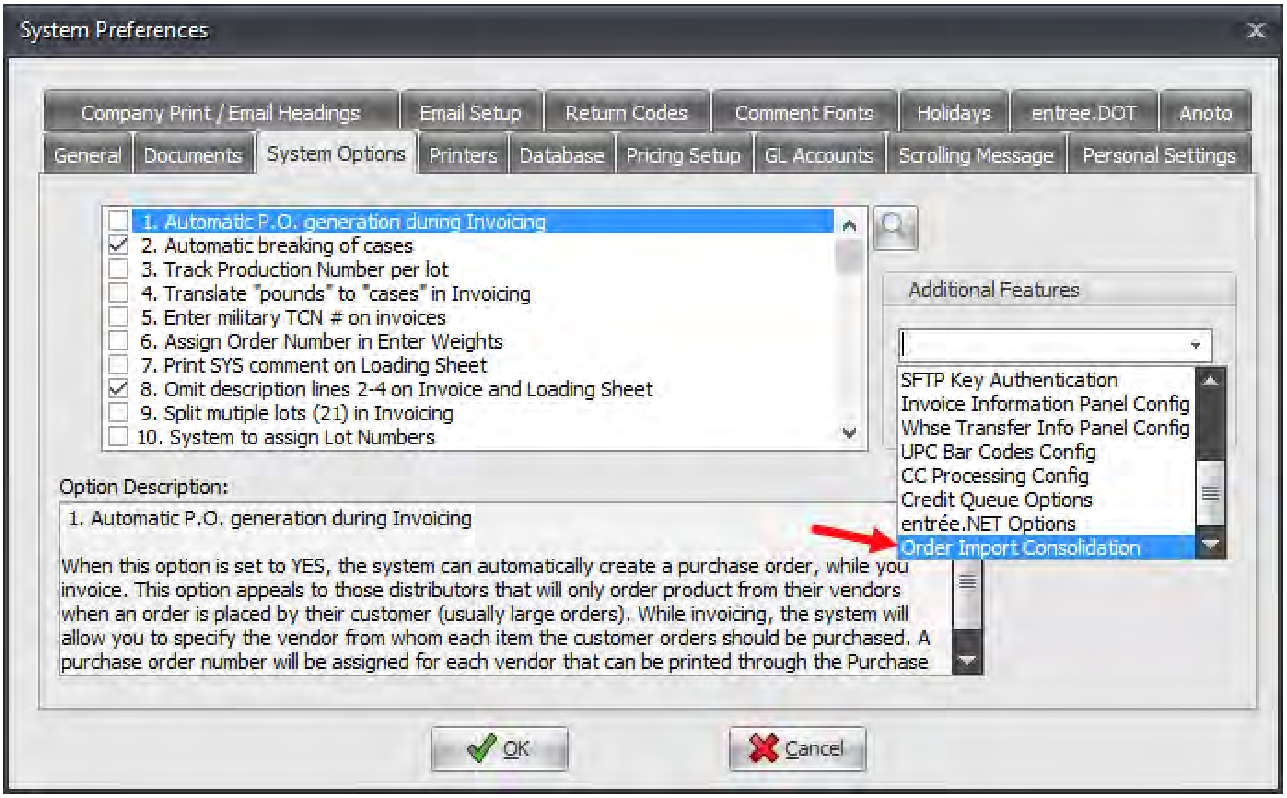
Feature Overview

- This feature allows the order import utility to automatically consolidate multiple orders for the same "**Ship To" Customer** and **Delivery Date** into a single invoice for the date.
- The Automatic Order Import Consolidation feature is ***OFF by default***.
- You must enable the feature and configure your entrée V4 settings using the Order Import Consolidation configuration dialog accessed in System Preferences before you can use it. See the entrée System Options section of this chapter for details.

- The feature can be enabled, disabled, or configured differently for each order source.
- The feature may be disabled on a per-customer basis in the Customer Miscellaneous Tab in the Import Options area. See the **entrée Customer File Options** section of this chapter for details.

The Invoice Selection Process

The process for selecting what invoice any new orders get consolidated into provides you with choices that are defined in the Order Import Consolidation dialog accessed via the entrée > System Preferences > System Options > Additional Features menu > **Order Import Consolidation** option.



The first invoice that passes all of the necessary checks will be used as the target for consolidating an incoming order.

If no existing invoice qualifies then a new invoice will be created. Here is a brief overview of the invoice selection process qualifications.

1. A list of existing invoices matching the “Ship To” Customer and Delivery Date from the incoming order is compiled.

2. Each invoice is run through at least these 5 checks in the order they were created in the system:

   a. If an invoice is locked by an external system (Invoicing, UPC, BFC, etc.) then it will be skipped.
   b. If the invoice has been canceled it will be skipped.
   c. If the invoice has already been Accepted or Rejected through the Credit Hold Queue (System Option #169) it will be skipped.
   d. Is the invoice printed? If the option to prevent editing of printed invoices is enabled then the invoice is skipped.
   e. Is a customer P.O. number present? The presence of a customer P.O. number requires special processing rules to be applied. * See the Handling Customer P.O. Numbers section for details.

3. Any additional checks that are specific to the import process may be done next. *See the Additional Checks for entrée.NET and Electronic Order Pad section that follows.

Handling Customer P.O. Numbers

The following rules are used to best retain Customer P.O. number information when selecting an invoice:

- If a P.O. number is not provided with the incoming order then this order may be consolidated to any qualified invoice with a ‘Verbal’ P.O. number.
- If a P.O. number is provided with the incoming order then the system may be configured in one of two ways:
  - Allow consolidation to any qualified invoice with the same P.O. number.
  - Require the system to always create a new invoice, even if one exists with the same P.O. number.

Additional Checks for entrée.NET and Electronic Order Pad

In order to ensure no user provided information is lost the entrée.NET and Electronic Order Pad will perform the following additional checks to determine if a new invoice must be created:

- When a comment is present on the existing invoice we can only consolidate to it when there is no comment on the incoming order or the "Print on L.S. Only" option is the same.
- When the “Order Giver” information is different we must create a new invoice.
- When we are configured to assign the invoice to the salesperson that created the order in the online system, we can only consolidate to invoices already assigned to the salesperson for the incoming order. *See the Related entrée.NET System Configuration Options image.
- When route information in present on the incoming order we can only merge to invoices with a matching route.
- When route information in present on the incoming order we can only merge to invoices with a matching route.

Rules for Merging Line Items

The consolidation process can be configured to attempt to consolidate line items from the incoming order to lines on the existing invoice.

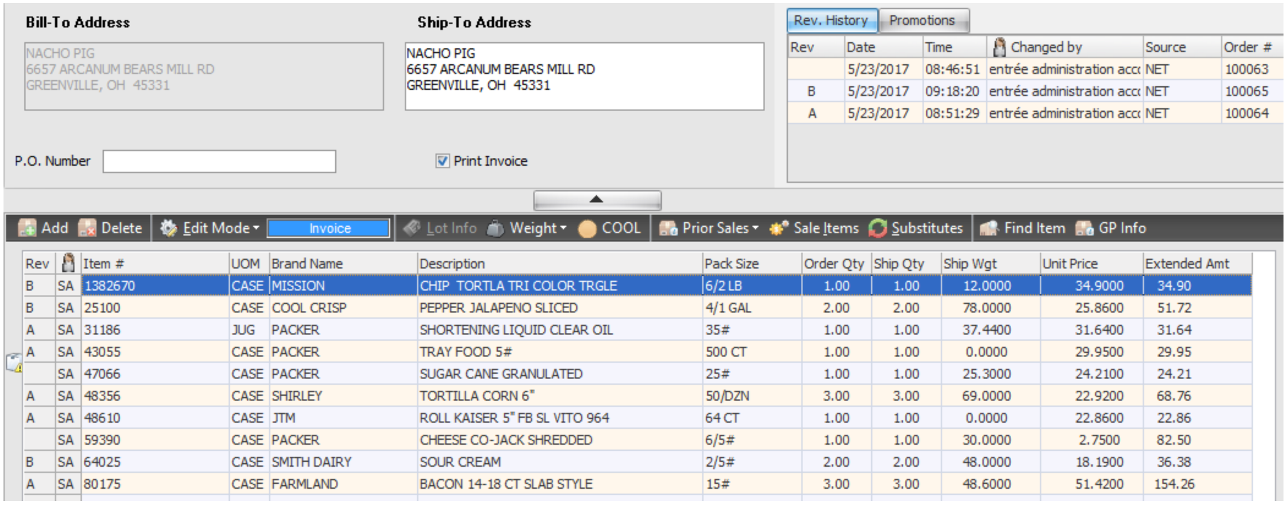
The base rules which allow for merging to an existing line item are:

- Debit Items: Item number must match.
- Credit Items: Item number and return code must match.

entrée.NET and Electronic Order Pad apply the following additional checks for merging line items:

- When a price has been set for the incoming order we can only consolidate to existing lines for the item with the same price.
- When item descriptions have been modified, we can only consolidate to existing lines with identical descriptions for all 4 description lines.
- When a Source Line ID submitted from an external system is present we can only consolidate to existing lines with the same Source Line ID. (This is currently only used by the City Brew Online integration for Valley Distributing.)
- When cut instructions are different we can only consolidate to existing lines with the same cut instruction. (Mod #862: Add a pop-up window in Create/Change Invoice used to enter / edit cutting instructions.)
- When a price change request is present, we can only consolidate to existing lines with the same price change request information. (Mod #863: Add a pop-up window in Create/Change Invoice which allows for entry/editing of a "requested price" value.)

Change Invoice & Revisions



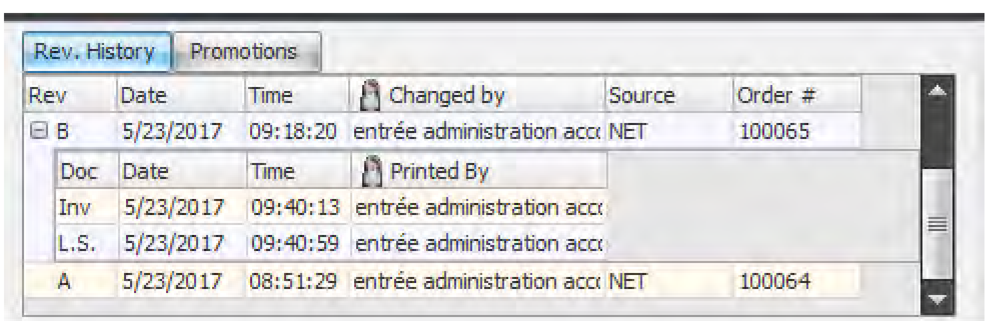
Rev	Date	Time	Changed by	Source	Order #
	5/23/2017	08:46:51	entrée administration acc	NET	100063
B	5/23/2017	09:18:20	entrée administration acc	NET	100065
A	5/23/2017	08:51:29	entrée administration acc	NET	100064

Rev		Item #	UOM	Brand Name	Description	Pack Size	Order Qty	Ship Qty	Ship Wgt	Unit Price	Extended Amt
B	SA	1382670	CASE	MISSION	CHIP TORTLA TRI COLOR TRGLE	6/2 LB	1.00	1.00	12.0000	34.9000	34.90
B	SA	25100	CASE	COOL CRISP	PEPPER JALAPENO SLICED	4/1 GAL	2.00	2.00	78.0000	25.8600	51.72
A	SA	31186	JUG	PACKER	SHORTENING LIQUID CLEAR OIL	35#	1.00	1.00	37.4400	31.6400	31.64
A	SA	43055	CASE	PACKER	TRAY FOOD 5#	500 CT	1.00	1.00	0.0000	29.9500	29.95
	SA	47066	CASE	PACKER	SUGAR CANE GRANULATED	25#	1.00	1.00	25.3000	24.2100	24.21
A	SA	48356	CASE	SHIRLEY	TORTILLA CORN 6"	50/DZN	3.00	3.00	69.0000	22.9200	68.76
A	SA	48610	CASE	JTM	ROLL KAISER 5" FB SL VITO 964	64 CT	1.00	1.00	0.0000	22.8600	22.86
	SA	59390	CASE	PACKER	CHEESE CO-JACK SHREDDED	6/5#	1.00	1.00	30.0000	2.7500	82.50
B	SA	64025	CASE	SMITH DAIRY	SOUR CREAM	2/5#	2.00	2.00	48.0000	18.1900	36.38
A	SA	80175	CASE	FARMLAND	BACON 14-18 CT SLAB STYLE	15#	3.00	3.00	48.6000	51.4200	154.26

In the Change Invoice screen shown below you can see the **Rev** column revision letters for items that have been consolidated.

Rev		Item #	UOM	Brand Name	Description	Pack Size	Order Qty	Ship Qty
B	SA	1382670	CASE	MISSION	CHIP TORTLA TRI COLOR TRGLE	6/2 LB	1.00	1.00
B	SA	25100	CASE	COOL CRISP	PEPPER JALAPENO SLICED	4/1 GAL	2.00	2.00
A	SA	31186	JUG	PACKER	SHORTENING LIQUID CLEAR OIL	35#	1.00	1.00
A	SA	43055	CASE	PACKER	TRAY FOOD 5#	500 CT	1.00	1.00
	SA	47066	CASE	PACKER	SUGAR CANE GRANULATED	25#	1.00	1.00
A	SA	48356	CASE	SHIRLEY	TORTILLA CORN 6"	50/DZN	3.00	3.00
A	SA	48610	CASE	JTM	ROLL KAISER 5" FB SL VITO 964	64 CT	1.00	1.00
	SA	59390	CASE	PACKER	CHEESE CO-JACK SHREDDED	6/5#	1.00	1.00
B	SA	64025	CASE	SMITH DAIRY	SOUR CREAM	2/5#	2.00	2.00
A	SA	80175	CASE	FARMLAND	BACON 14-18 CT SLAB STYLE	15#	3.00	3.00

The **Rev. History** grid has been updated to include the **Source** and **Order #** columns so you can see what orders numbers were consolidated into the invoice for each revision and their source. In the example here we expanded it so you can see the three orders with A and B revisions from the NET source and the printed Invoice and Loading Sheet with the date and time.



Rev	Date	Time	Changed by	Source	Order #
B	5/23/2017	09:18:20	entrée administration acc	NET	100065

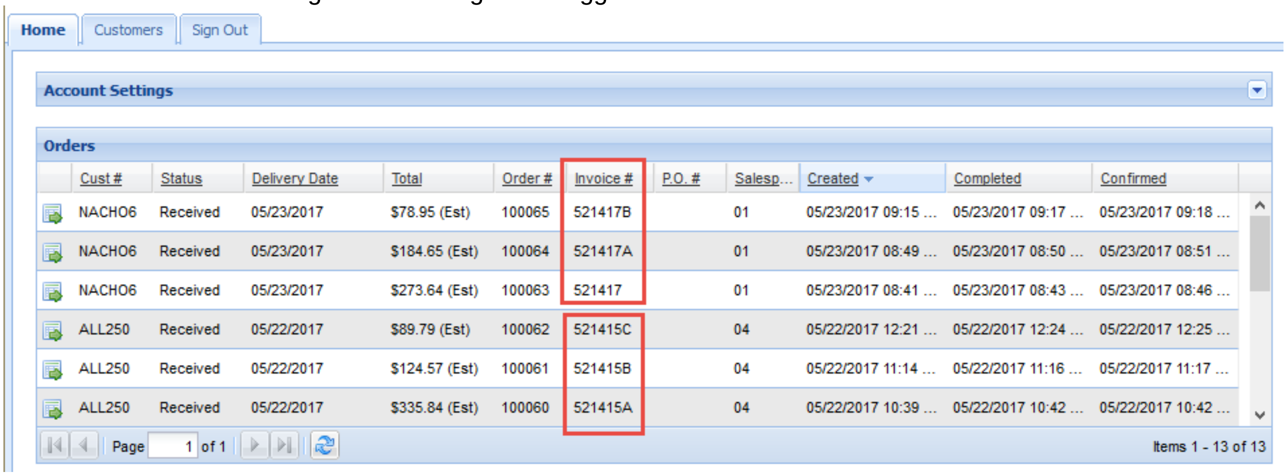
Doc	Date	Time	Printed By
Inv	5/23/2017	09:40:13	entrée administration acc
L.S.	5/23/2017	09:40:59	entrée administration acc

Rev	Date	Time	Changed by	Source	Order #
A	5/23/2017	08:51:29	entrée administration acc	NET	100064

Customer Order Confirmation

Order confirmations sent to the entrée.NET server will now include the invoice revision number. If the revision number is greater than 0 (‘A’ or later) it will be included with the invoice number in the following places:

- entrée.NET: Pending Orders listing when logged in as the Distributor.



Home | Customers | Sign Out

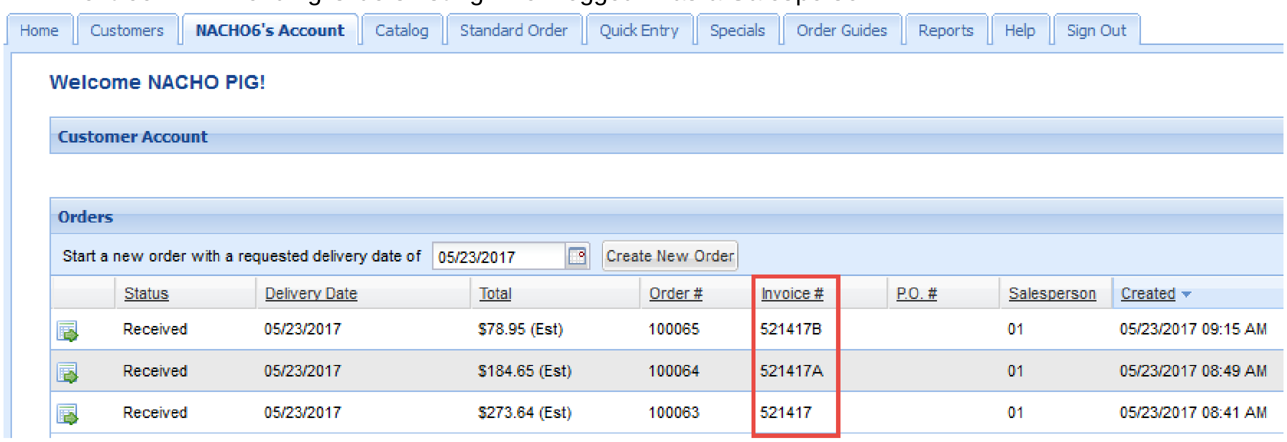
Account Settings

Orders

Cust #	Status	Delivery Date	Total	Order #	Invoice #	P.O. #	Salesp...	Created	Completed	Confirmed
NACHO6	Received	05/23/2017	$78.95 (Est)	100065	521417B		01	05/23/2017 09:15 ...	05/23/2017 09:17 ...	05/23/2017 09:18 ...
NACHO6	Received	05/23/2017	$184.65 (Est)	100064	521417A		01	05/23/2017 08:49 ...	05/23/2017 08:50 ...	05/23/2017 08:51 ...
NACHO6	Received	05/23/2017	$273.64 (Est)	100063	521417		01	05/23/2017 08:41 ...	05/23/2017 08:43 ...	05/23/2017 08:46 ...
ALL250	Received	05/22/2017	$89.79 (Est)	100062	521415C		04	05/22/2017 12:21 ...	05/22/2017 12:24 ...	05/22/2017 12:25 ...
ALL250	Received	05/22/2017	$124.57 (Est)	100061	521415B		04	05/22/2017 11:14 ...	05/22/2017 11:16 ...	05/22/2017 11:17 ...
ALL250	Received	05/22/2017	$335.84 (Est)	100060	521415A		04	05/22/2017 10:39 ...	05/22/2017 10:42 ...	05/22/2017 10:42 ...

Page 1 of 1 — Items 1 - 13 of 13

- entrée.NET: Pending Orders listing when logged in as a Salesperson .



Home | Customers | NACHO6's Account | Catalog | Standard Order | Quick Entry | Specials | Order Guides | Reports | Help | Sign Out

Welcome NACHO PIG!

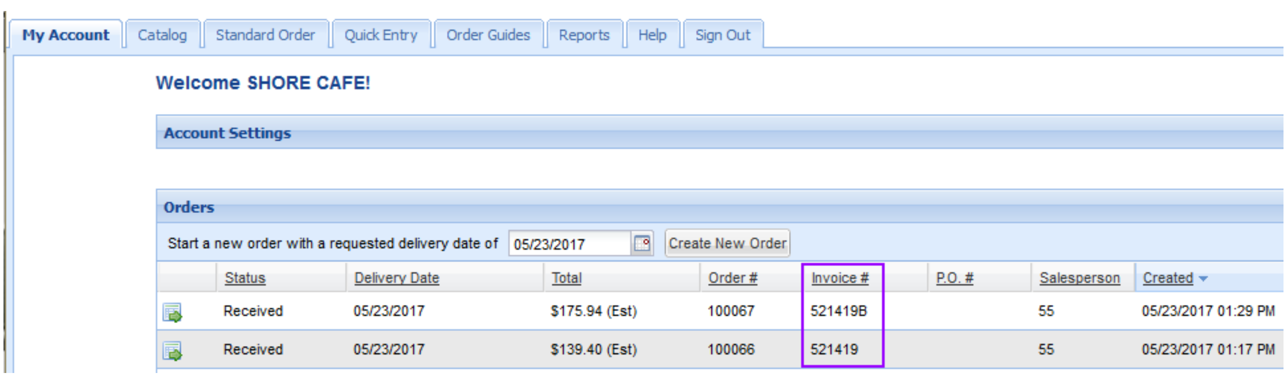
Customer Account

Orders

Start a new order with a requested delivery date of 05/23/2017 Create New Order

Status	Delivery Date	Total	Order #	Invoice #	P.O. #	Salesperson	Created
Received	05/23/2017	$78.95 (Est)	100065	521417B		01	05/23/2017 09:15 AM
Received	05/23/2017	$184.65 (Est)	100064	521417A		01	05/23/2017 08:49 AM
Received	05/23/2017	$273.64 (Est)	100063	521417		01	05/23/2017 08:41 AM

- entrée.NET: Pending Orders listing when logged in as a Customer.



My Account | Catalog | Standard Order | Quick Entry | Order Guides | Reports | Help | Sign Out

Welcome SHORE CAFE!

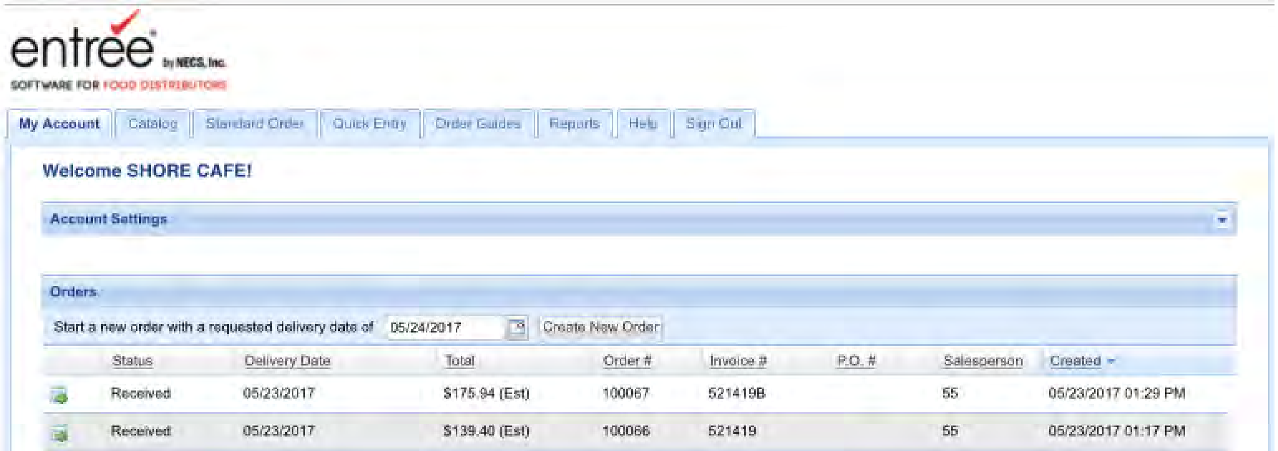
Account Settings

Orders

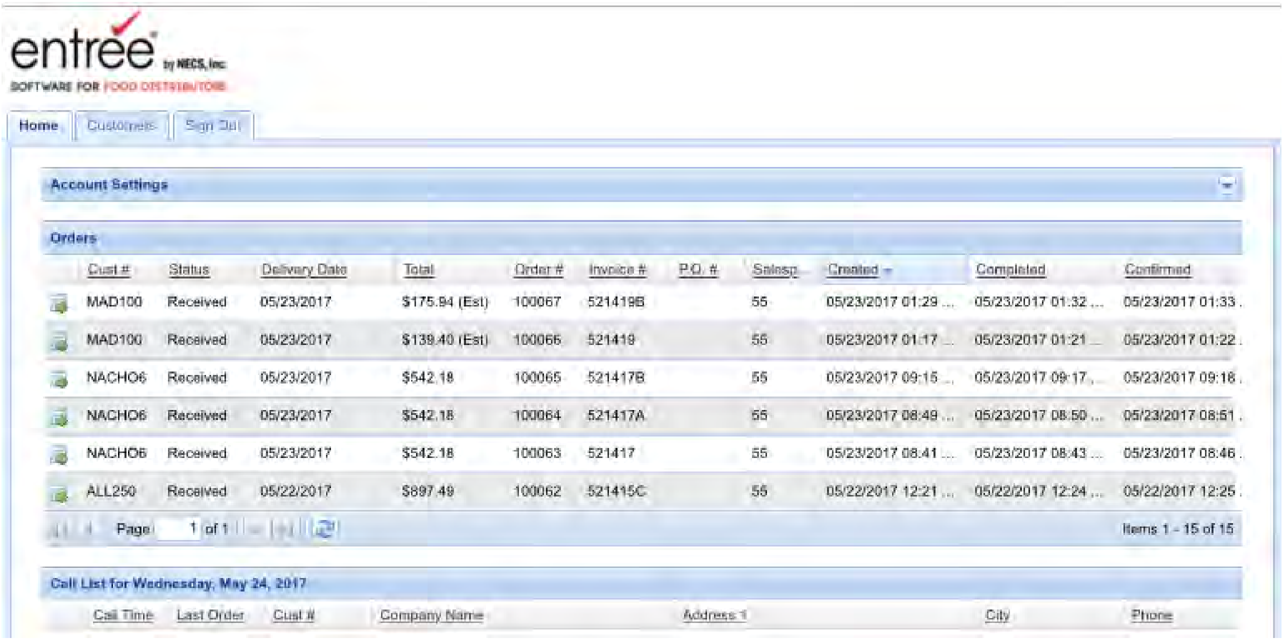
Start a new order with a requested delivery date of 05/23/2017 Create New Order

Status	Delivery Date	Total	Order #	Invoice #	P.O. #	Salesperson	Created
Received	05/23/2017	$175.94 (Est)	100067	521419B		55	05/23/2017 01:29 PM
Received	05/23/2017	$139.40 (Est)	100066	521419		55	05/23/2017 01:17 PM

- Electronic Order Pad: Customer's My Account tab in the Orders section.



- Electronic Order Pad: Salesperson's Home tab in the Orders section.



Email Order Confirmations

Confirmation notice emails informing the customer that their order has been converted to an invoice will show the invoice number with revision letter when order import consolidation has occurred.

Example The customer Invoice (below) and Loading Sheets will show the invoice number with the last revision letter appended.

Madison Distribution
1000 E. 9th Street
Cleveland, OH 44144
Phone: (475) 221-8200 Fax: (203) 208-0889

INVOICE

Invoice No: 521417B
Invoice Date: 05/23/17
Page No: 1 of 1

Sold To:	Sold To:
NACHO PIG 6657 ARCANUM BEARS MILL RD GREENVILLE, OH 45331 SHANNON - (937) 564-3495	NACHO PIG 6657 ARCANUM BEARS MILL RD GREENVILLE, OH 45331 SHANNON - (937) 564-3495

Customer No.	P.O. Number	Salesperson	Truck/Route	Order Date	Terms
NACHO6		55	/	05/23/17	NET 14 DAYS

Line	Item Number	Qty. Ordered	Qty. Shipped	UOM	Description	Billing Units	Unit Price	Extended Amount
1	64025	2.00	2.00	CASE	SOUR CREAM	2	18.19	36.38
2	47066	1.00	1.00	CASE	SUGAR CANE GRANULATED	1	24.21	24.21
3	59390	1.00	1.00	CASE	CHEESE CO-JACK SHREDDED	30.00	2.75	82.50
4	48356	3.00	3.00	CASE	TORTILLA CORN 6"	3	22.92	68.76
5	80175	3.00	3.00	CASE	BACON 14-18 CT SLAB STYLE	3	51.42	154.26
6	31186	1.00	1.00	JUG	SHORTENING LIQUID CLEAR OIL	1	31.64	31.64
7	25100	2.00	2.00	CASE	PEPPER JALAPENO SLICED	2	25.86	51.72
8	43055	1.00	1.00	CASE	TRAY FOOD 5#	1	29.95	29.95
9	48610	1.00	1.00	CASE	ROLL KAISER 5" FB SL VITO964	1	22.86	22.86
10	1382670	1.00	1.00	CASE	CHIP TORTLA TRI COLOR TRGLE	1	34.90	34.90
					*** FUEL SURCHARGE ***			5.00

*** Payment Due by 06/06/17 ***
We will be closed on May 29 for Memorial Day

Hot Tip! **Order Import Consolidation Rules Review**

- Only invoices for the same **Ship-To Customer** Number and **Delivery Date** can be consolidated.
- For the invoice to qualify for consolidation **you can *only add new items or increment quantities*** on existing items in the original invoice. *No removals or reductions to existing line items are allowed.*
- Invoices that qualify will be consolidated into the ***first invoice number of that day*** for the customer.
- Each consolidated order will be *added to the **original invoice with their own Revision letter*** group.
- All items on the invoice will be ***sorted in order by item number*** with each order consolidation.
- The subsequent orders that get consolidated into the first invoice of the day will be "Canceled". Instead of showing "Canceled" on the Invoice Register report it ***will show the revision letter*** following the invoice number. See example that follows.

Date: 05/23/17 Madison Distribution Page: 1
Time: 2:56 PM Invoice Register - Print For: All invoices
Covers Period: May 17 2017 - May 23 2017

Invoice Date	Invoice Number	Bill To Number	Bill To Company	Sales ID	Invoice Tax	Invoice Total
05/23/17	521419B	000010	A & B CAFE	55	0.00	298.34
05/22/17	521415C	ALL250	ALL AMERICAN DRIVE T	55	0.00	902.49
05/22/17	521416	ALL250	ALL AMERICAN DRIVE T	55	0.00	590.99
05/17/17	521414A	MAD101	MADISON FUN FOODS	55	0.00	403.30
05/23/17	521417B	NACHO6	NACHO PIG	55	0.00	542.18
05/23/17	521418	NACHO6	NACHO PIG	55	0.00	-82.50

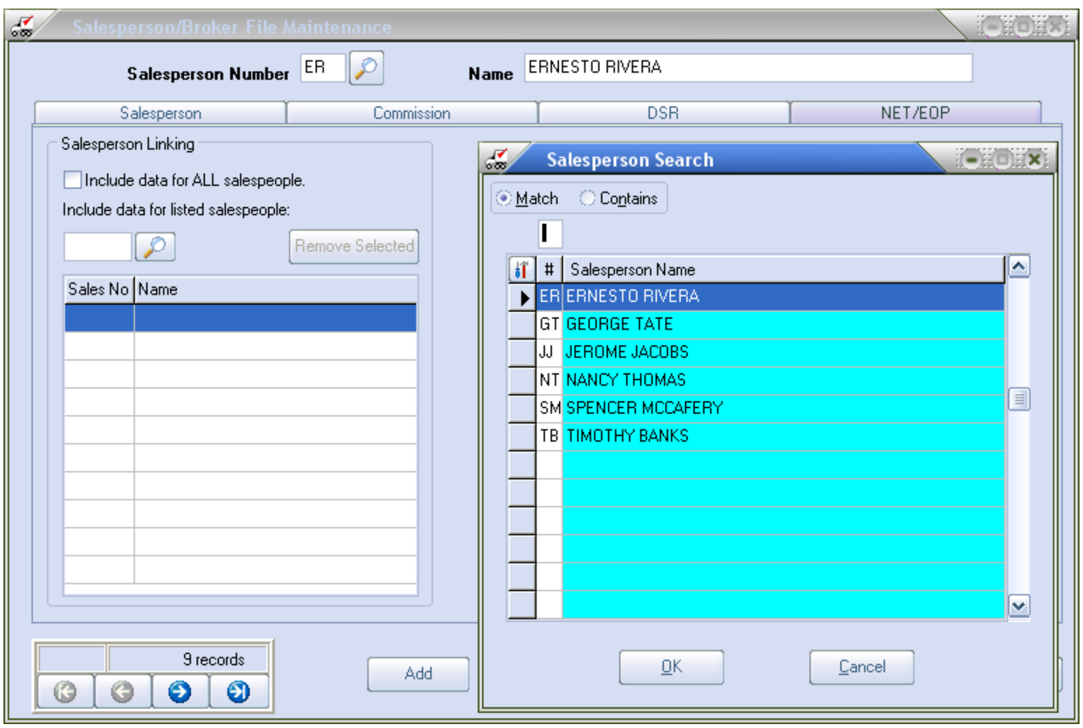
Report Totals:

					0.00	2,654.80

4.2 entrée Salesperson File Options

entrée V3 Salesperson File Options

In the main **entrée system** go to **Salesperson/Broker File Maintenance (SFM)** and update the **NET/EOP** section for your DSRs.



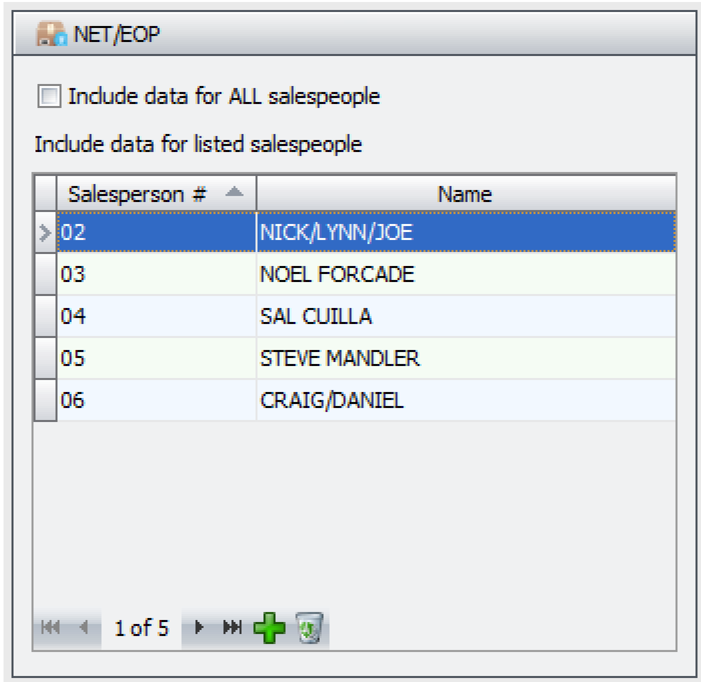
- Once you find the salesperson in the system click the **NET/EOP** tab and update the options. The options are explained in the **entrée V4** section that follows.
- Once your options have been set click **OK** to save in **entrée**.

Note In **entrée version 3** the **Remote Order Entry** tab was renamed to **DSR**. These settings are for the **entrée.DSR** add-on module only.

entrée V4 SQL Salesperson Mobile Tab

- **NET/EOP** section - Has the **Include data for ALL salespeople** and the **Include data for listed salespeople** options. Both **entrée.NET** and the **Electronic Order Pad** will now include the customers for the salespeople selected in the Mobile Tab **NET/EOP** section.

This **NET/EOP** feature allows you to include data from an unlimited number of additional salespeople.



Buttons:

**Green Plus Sign** click and add a salesperson.

 **Trash Can** removes a salesperson.

- **Include data for ALL salespeople**
  - To activate the option it must be checked. This option is not checked by default.
  - When this option is checked the salesperson will receive data for **all** customer accounts, regardless of who they are assigned to.
  - When checked this option will override the "**Salesperson can view and place orders for all customers**" option set to "**No**" in **entrée.NET Settings** > **Options** > **Salespeople** section.
  - When checked this option will *deactivate* any "**Include data for listed salespeople**" assignments.

- **Include data for listed salespeople Option**
  - This feature has been enhanced to allow you to link and include data from an unlimited number of salespeople using the Salesperson Search dialog**.**
  - This feature will make it easy for you to setup and provide coverage of customer accounts so no customer is ever forgotten when a salesperson is out of the office.
  - Use the Salesperson Search dialog shown here to add salespeople to the Salesperson Linking list.

- See the **Scheduler/Data Export/Order Import** chapter for **entrée Exclude Item Option** for exporting.

4.3 entrée Inventory File Options

entrée V3 Use menu path: **File** > **Inventory File Maintenance** > find the item > select the **.NET Tab**.

entrée V4 SQL Go to the **Inventory** ribbon menu > **Inventory** option > find the item > select the **.NET Tab**.

- **Exclude item from export**

NECS has built into the main **entrée** system the ability for you to exclude any of your inventory items from export to your **entrée.NET** online ordering system. Check the box to activate this option.

- **Exclude item from public website catalog**
  This option can be used to tailor the items listed in your public website catalog since you may not want every item you sell to be shown.

  When this option is checked that specific item will still be listed during order entry for salespeople and for logged-in customers in **entrée.NET** and the **Electronic Order Pad**, but these items will not be listed in your public website catalog.

- **Restricted Item**
  Define items to be "restricted", as a general rule, from **entrée.NET**, so that they will not appear to the customer when they are placing their order online, searching for items, etc.

  What makes this enhancement unique is that if the customer does have the item defined in the Customer Special Price/Standard Order file, they will still be allowed to purchase it, and it will be displayed to them when placing an online order.

  You can use this feature for situations such as a special order item, that you purchase for a specific customer (or group of customers), that your normal customer base is not allowed to order. An item may be set as restricted by checking the box for "Restricted item".

- **Allow item to be sold at $0.00**
  Setting this option on the item allows it to be displayed in **entrée.NET** and added to an order with no price. For salespeople this will also allow them to change the price for the item to $0.00 even if a valid non-zero price was calculated by the system.

  Support for this feature is enabled by default in **entrée.NET** and **Electronic Order Pad.**

  In **entrée.NET** option # **80 Prevent sale of items marked as 'Allow item to be sold at $0.00'** option will disable this feature globally or on a per-user basis in **entrée.NET** and the **Electronic Order Pad**.

Order Entry -

Enable .NET Min / Max Quantity Warning

For your customers placing online orders with **entrée.NET**, you can now define a "minimum" and "maximum" item quantity that they are allowed to order. This feature will allow you to enforce minimum order quantities for specific items and maximum order quantities.

For specific items the minimum and maximum quantity numbers must be defined in entrée by following these steps.

1. Find the item in the Inventory file.

2. Click the **.NET tab**.
3. Enter the **Min Qty** and **Max Qty** values.
4. Next you must enable the min/max feature in **entrée.NET** and the related system option **# 37 Display min/max quantity warnings.**

Item Tags

The "Item Tags" feature provides an alternative method for grouping items in the **entrée.NET** system which is independent of their "Class" values. This feature could be used to identify all Kosher or Gluten-free items regardless of how they are normally classified in **entrée** itself. Any item may have multiple tags associated with it.

Item Tags are assigned to items using the Item Tags search feature pictured above. The tags list works similar to "Class" where defining a new tag will automatically add it to the list of available tags used in the search.

Click the search icon  then click on an item tag in the list to select it > click **OK**.

- In the **entrée.NET Options** **General** section the **# 30 Display item "Tags"** option must be set to **Yes** to view item tags.

Creating New Item Tags

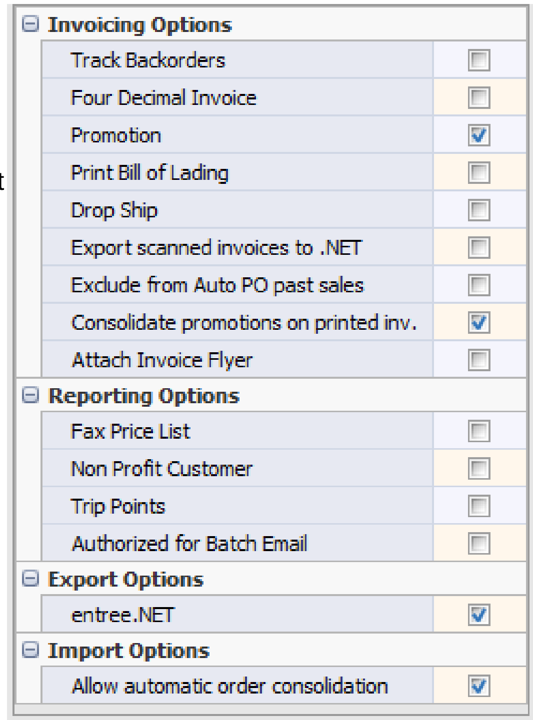
entrée V3 Use menu path: **File** > **Item Tag Maintenance** > **List Management** dialog box will display.

entrée V4 SQL Go to the **Add-Ons** ribbon menu and select the **entrée.NET** tab **Item Tags** option.

4.4 entrée Customer File Options

entrée V3 Use menu path: **File** > **Customer File Maintenance** > find the customer > select the **Miscellaneous 1 Tab** > **Miscellaneous Options** list.

entrée V4 SQL
Go to the **Inventory** ribbon menu > **Inventory** option > find the item > select the **Miscellaneous Tab** > **Invoicing Options** list.



Export Options

entrée.NET When you check this option on a customer account the customer's scanned invoices will be exported to the **entrée.NET** server and will appear in the customer file in **entrée.NET** or in the **Electronic Order Pad**.

Import Options

Allow automatic order consolidation - Used for consolidation of **entrée.NET** or in the **Electronic Order Pad** orders when imported.

The Automatic Order Import Consolidation feature may be disabled / enabled on a per-customer basis here in the Customer Miscellaneous Tab.

- Be sure to click **Apply** to save the changes.

entrée V3 **Exclude from .NET Export**

When you check this option on a customer account the customer's data will not be exported to the **entrée.NET** server and will not appear in the customer file in **entrée.NET** or in the **Electronic Order Pad**.

4.5 entrée System Options

There are system options that can be set in the main **entrée** system that will impact how **entrée.NET** and **EOP** work. These options are listed below.

System Options

- **System Option #171 - Use Landed Cost for GP Calculations in Invoicing**. This option is automatically set and maintained based on the system option setting in **entrée**.

  When this option is checked the calculation of Gross Profit in Invoicing will change to be based off of Landed Cost rather than Base Cost. This option has been expanded so that it also controls the calculation of the "Margin %" column on the "Cost/Price" tab of **entrée** Inventory File Maintenance.

- **System Option #180** - **Invoicing deducts billback amount when calculating Gross Profit** features introduced in the **entrée.NET** and the **Electronic Order Pad** Version 3.4.1.

  Support for this option is provided to ensure the correct representation of GP information when viewing printed invoice information from any of the sales reporting features in the Electronic Order Pad - it has not been integrated into the GP estimation calculation when placing orders. This option is automatically set and maintained based on the **entrée** system options settings.

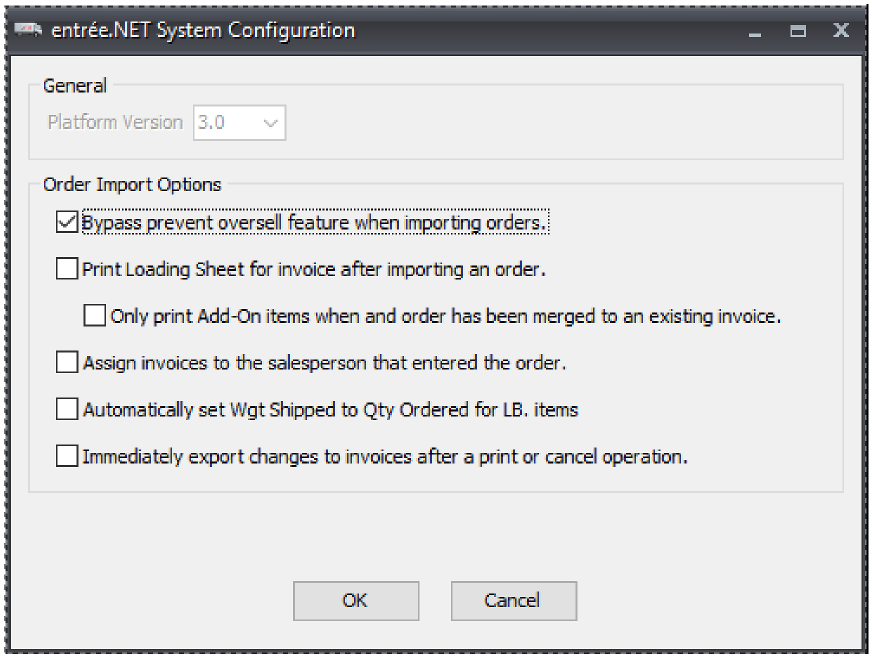
System Options Additional Features

entrée V3 Use menu path: **System** > **System Preferences** > **System Options** tab > click **Additional Features** drop down menu > select **entrée.NET Options** > click **Configure** button.

entrée V4 SQL Go to the **System** ribbon menu > **System Preferences** > **System Options** tab > click **Additional Features** drop down menu > select **entrée.NET Options** > click **Configure** button.

.NET Configuration Options

General:
For **entrée.NET** users you now have the ability to update the **entrée.NET** version number by clicking on the drop down list when it is activated.



- **Order Import Options support these entrée system options:**
  - **System Option #80** - "Prevent OVERSELL of items".
  - **System Option #126** - "Prevent OVERSELL of items on Sales Orders".
  - **System Option #128** - "Prevent oversell is allowed to reallocate product".

- **Bypass prevent oversell feature when importing orders**
  Controls the use of systems options for oversell on orders imported into **entrée** from **entrée.NET**. Check the box for to activate the option.

- **Print Loading Sheet for invoice after importing an order**
  Provides the option to print Loading Sheets when importing the orders from **entrée.NET**. Check the box for to activate the option. Once this option has been enabled the Loading Sheet for invoices created from **entrée.NET** orders will automatically be printed to your configured "Loading Sheet" printer as part of the order import process.

  - **Only print Add-On Items when an order has been merged to an existing invoice:** This new option helps control when Loading Sheets are printed for merged orders and whether Add-On Items print.

Note The printing process was revised to ensure that only one Loading Sheet is printed per-invoice during an import batch. This way if the initial invoice and all of the associated revisions are imported in one shot it will only print one copy of the Loading Sheet.

- **Assign invoices to the salesperson that entered the order**

This option provides the ability to control which salesperson gets assigned to orders placed through both **entrée.NET** and the **Electronic Order Pad**.

Activating this option will change the order entry process so that the Salesperson ID of the person entering the order will be assigned to that order. The normal behavior of the system is to always assign the salesperson according to the salesperson assigned to the customer in **entrée** Customer File Maintenance.

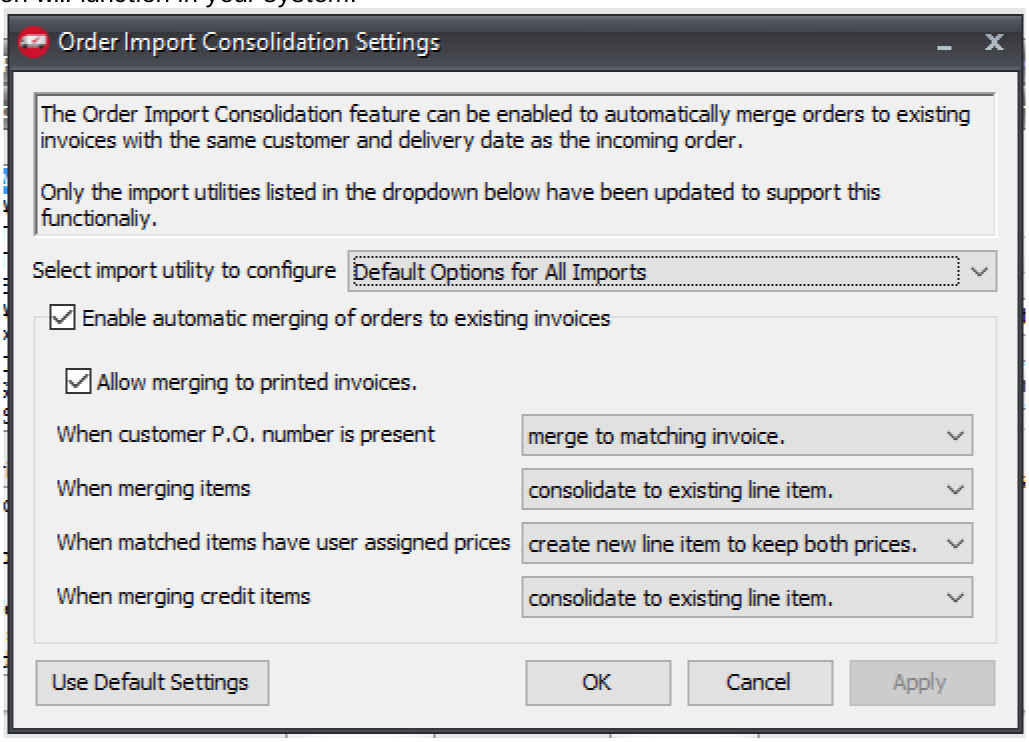
- **Automatically set Wgt Shipped to Qty Ordered for LB. items**
  This option will set the "Weight Shipped" value for "LB." items to automatically be set to match the "Quantity Ordered" value during the order import process.

- **Immediately export changes to invoices after a print or cancel operation**
  This new "Sales Update" mode only transfers pending invoice changes. It allows the new export to run automatically any time an invoice has been printed or canceled. This mode does not require a lock on the export process to permits it to run while other exports are in process.

Order Import Consolidation

entrée V4 SQL Go to the **System** ribbon menu > **System Preferences** > **System Options** tab > click **Additional Features** drop down menu > select **Order Import Consolidation** > click **Configure** button.

The Order Import Consolidation Settings dialog will open. Here you will configure how the order import consolidation will function in your system.



1. **Enable automatic merging of orders to existing invoices:** Check this option to turn on the Order Import Consolidation feature in selected import utility for entrée.

2. Now select the import utility you want to use with the consolidation features.

   Select import utility to configure:

   - **entrée.NET**

  - **Electronic Order Pad**
  - **Default options for All imports.** (only entrée.NET and the Electronic Order Pad app at this time)

- **Next you have to make some decisions about how you want order import consolidation to work.**

3. **Allow merging to printed invoices:** Check this option to override the system default and merge a new invoice with a printed invoice. Once enabled the system can modify an invoice that has already been printed. The system default has the invoice left in an unprinted state.

Caution For printed invoices the ***default is NO order import consolidation*** unless this override option is checked.

4. **When Customer P.O. Number is present:** To control how orders with customer provided P.O. numbers will be handled you have two options.

   - **Merge to matching invoice:** Consolidate orders for the same customer, delivery date, and customer provided P.O. number. Any customer invoice WITHOUT a P.O. Number merges by Delivery Date.
   - **Always create a new invoice:** Will create a new invoice for any order with a customer provided P.O. number even if the same P.O. number has been submitted with another order for the same customer and delivery date.

5. **When Merging Items:** you have two options for controlling how items from the incoming order are added to the existing invoice.

   - **Always Create a New Line Item:** Will always create a new line item for each line item of the incoming order, even if another entry for the item with the same price is already on the invoice.

   - **Consolidate to Existing Line Item:** Checks for a line item with the same item number and price on the existing invoice. If one is found the quantity from the incoming order for that item will be added to the existing line item.

6. If you select the **Consolidate to Existing Line Item** option you will have to make a selection for the **When matched item has user assigned prices** option. These options allow you to control line item price conflicts. It *only applies if a price has been manually set* in either entrée or the entrée.NET or Electronic Order Pad remote systems.

   - **Create new line item to keep both prices:** Will not merge line items and will instead create a new line entry to keep the pricing separated. Will result in two entries for the same item with different prices on one invoice.

   - **Merge and use the current invoice price:** Will add the quantity from the incoming order to the matched line item entry on the invoice. It will ignore the incoming price and keep the currently set price on the invoice.

   - **Merge and use the incoming order price:** Will add the quantity from the incoming order to the matched line entry and replace the current price with the new price from the incoming order.

7. **When Merging Credit Items:** If your entrée system is setup to allow credit items to be entered on invoices an additional option for controlling how credit items from the incoming order are added to the existing invoice can be controlled by these two options.

- **Consolidate to Existing Line Item:** Will check for a credit line item with the same item number price, and return code on the existing invoice. If one is found the quantity from the incoming order for that item will be added to the existing line item.
- **Always Create a New Line Item:** Always creates a new line item entry each line item of the incoming order.

8. Be sure to click **Apply** then **OK** to save your settings.

Chapter 5
entrée.NET Settings

5 entrée.NET Settings

The first task for the System Administrator is to update the **Settings** tab in **entrée.NET** for your company. Sign in to your **entrée.NET** system and click on the **Settings** menu tab to proceed with customizing your system.

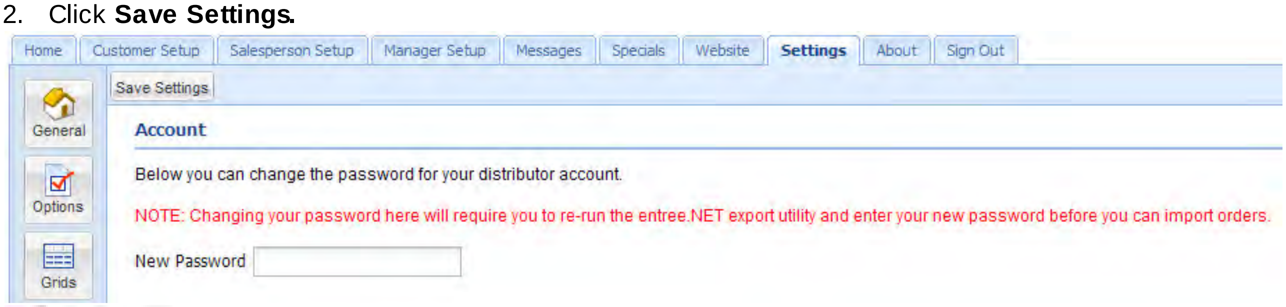
The **Settings** tab has buttons which run along the left side of the screen for these features: General, Options, Ads, Grids, Email and EOP (Electronic Order Pad). Each of these features will be described in this chapter. The system options for **entrée.NET** are displayed in collapsed lists in the image below and are described in the **Options** section of this chapter.

General Settings

Account

Distributors have the ability to change their **entrée.NET** login password in the **Settings** tab.

1. In **New Password** field type your new password.
2. Click **Save Settings.**



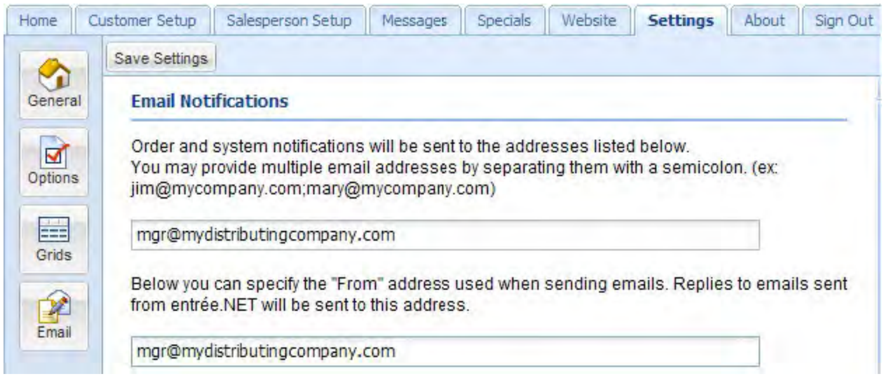
Hot Tip! **Changing your password will require you to do the following before you can import orders again.**

3. Login to **entrée** and run the **entree.NET Export Utility**.
4. Then login to **entrée.NET** with your new password.

Email Notifications

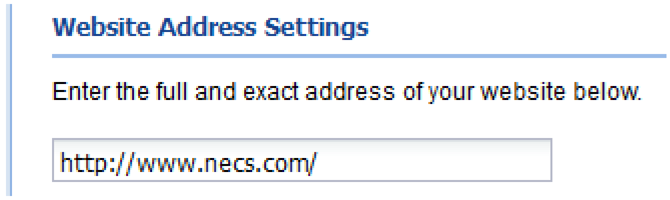
You will need to enter email addresses in 2 boxes. The first box is used to receive **entrée.NET** order and systems notifications and in the second box specify your "From" email addresses. You may provide multiple email addresses for both entries by separating them with a semicolon.

1. Type your email addresses in the Order and System Notification box.
2. Type your email addresses in the "**From**" address box.
3. Use only a semicolon between each email address.
4. Click the **Save Settings** button above before continuing your updates.



Website Address Settings

Enter the URL website address to redirect customers to when they sign out of **entrée.NET**.



This setting is intended for distributors who have a website that is not part of their **entrée.NET** plan and would prefer to redirect customers to the website instead of returning them to the **entrée.NET** login page.

Company Logo

Your company logo will be displayed on all the pages in your **entrée.NET** system,in your website sign-in page or your order entry login page and on the **Electronic Order Pad** sign-in screen. Acceptable image file formats are JPEG, GIF and PNG. Any size file will be accepted as it will automatically be scaled down to fit.

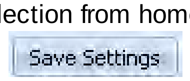
1. Click the **Browse** button and locate your logo image file on your computer.
2. Click on the logo file name in the File Upload window then click **Open.**

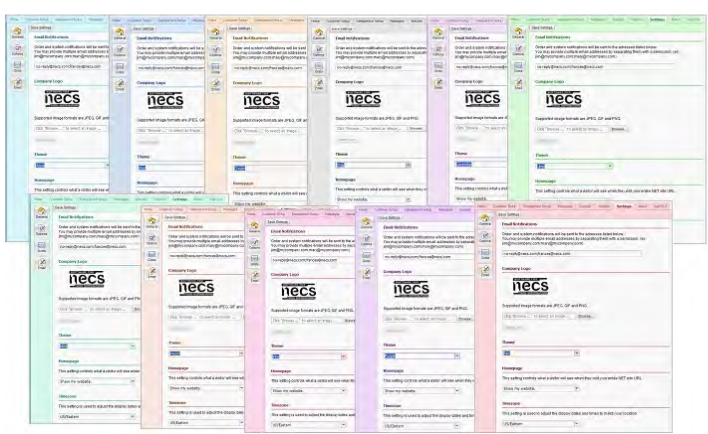
3. The file will appear in the image box then click the **Upload Logo** button.

4. Your logo will now appear in the company logo section and in the top left corner of your **entrée.NET** page.
5. Click the **Save Settings** button.

Theme

Change your color theme for **entrée.NET** whenever you like. Just select a color from the Theme drop down list**.** Choose from the colors shown below starting from the top row left side; aqua, blue, cream, gray, lavender, lime, mint, peach, pink, purple and red.

1. Click the down arrow to make a selection from homepage style drop down menu.
2. Click **Save Settings** button above. 

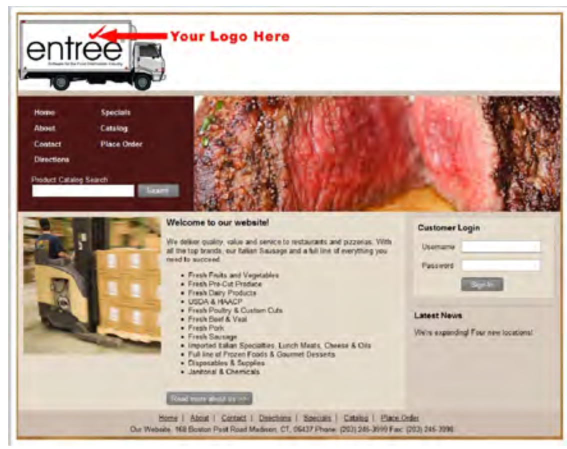


Homepage

If you purchased the website with all **entrée.NET** features, you will need to make a selection to control what your customers see when they visit your **entrée.NET** system.

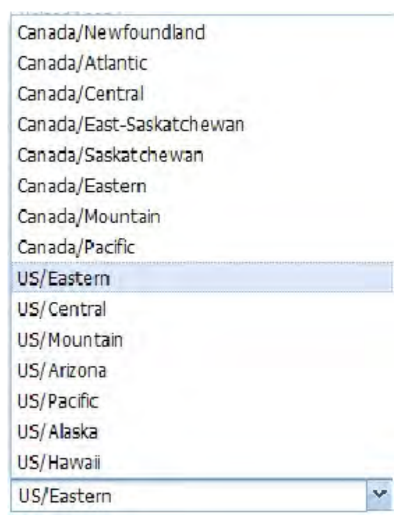
1. Click the down arrow to make a selection from homepage style drop down menu.
2. Click on either **Show the order entry login page** or **Show my website**.

Example The Order Entry Login page and the full website home page with the Customer login area on the right.



Timezone

Update your **Time Zone** by selecting it from the drop down list.



5.1 Options

Options Settings

The options have assigned numbers to provide a clear way to communicate about the many options available. The next step requires you to set the system options for **entrée.NET**. These are similar to the system options in the main **entrée** system.

1. Click on the **Options** icon in the menu on the left.
2. **Option Description** and **Current Setting** columns are displayed for each option.
3. Note that the bottom of the section will display a full explanation of how the selected option will operate.
4. Click in the **Current Setting** column to select the new setting from the drop down list.
5. Option changes will update immediately.

Hot Tip! Use the minus or plus sign icons next to the section headings to expand or collapse the lists.

Configuration – Allows you to let customers control their own page layout.

#	Option Description	Current Setting
Configuration		
1000	Can change "Standard Order" grid layout.	Yes
1001	Can change "Search" grid layout.	Yes
1002	Can change "Quick Entry" grid layout.	Yes

- **#1000 Can change “Standard Order” grid layout.** Turning this option on allows the customer to modify the column visibility and layout of the "Standard Order" grid.

- **#1001 Can change “Search” grid layout.** Turning this option on allows the customer to modify the column visibility and layout of the "Standard Order" grid.

- **#1002 Can change “Quick Entry” grid layout.** Turning this option on allows the customer to modify the column visibility and layout of the "Quick Entry" grid.

Electronic Order Pad

EOP is our mobile application based off **entrée.NET**. It was created primarily as an order entry tool for your DSRs. All possible options are not displayed in the image above. For more information about this product visit: https://www.necs.com/orderpad.

- **#50 Enable barcode scanning input in "Quick Entry".** Setting this option to "YES" will enable UPC barcode scanning support in "Quick Entry"tab of EOP. This allows for UPC barcodes to be entered into the "Scanner Input" text field using a HID compatible scanner. This will option will also match against secondary UPC numbers, if defined in **entrée** Inventory File maintenance.

- **#51 Enable "continuous scanning" for entering quantities in "Quick Entry".** Setting this option to "YES" will allow for quantities to be entered through the barcode scanning feature. When enabled items will be added to the order with an order quantity of 1 and each additional scan will increment the quantity until a new item is scanned or manually entered. This feature only applies when first adding an item through "Quick

Entry", changes to an item previously entered must still be done manually. **This option also requires that Enable barcode scanning input in "Quick Entry" to be enabled.**

- **#52 GP Review - Minimum Gross Profit %.** Items with a Gross Profit percentage lower than this value will be displayed in red on the "GP Review" tab.

- **#53 GP Review - Target Gross Profit %.** Items with a Gross Profit percentage lower than this value will be displayed in yellow on the "GP Review" tab.

- **#54 Allow Salesperson to enter route information.** Setting this option to "Yes" will allow the salesperson to enter route information to be assigned to the **entrée** invoice when completing an order.

- **#58 Allow Salesperson to edit Description Lines 1 - 4.** Setting this option to "Yes" will allow the salesperson to edit item description lines 1 - 4. When they click on the item description the description edit dialog will display. Then they can modify any of the four description lines to be displayed on the invoice and loading sheet (requires entrée 3.6.6).

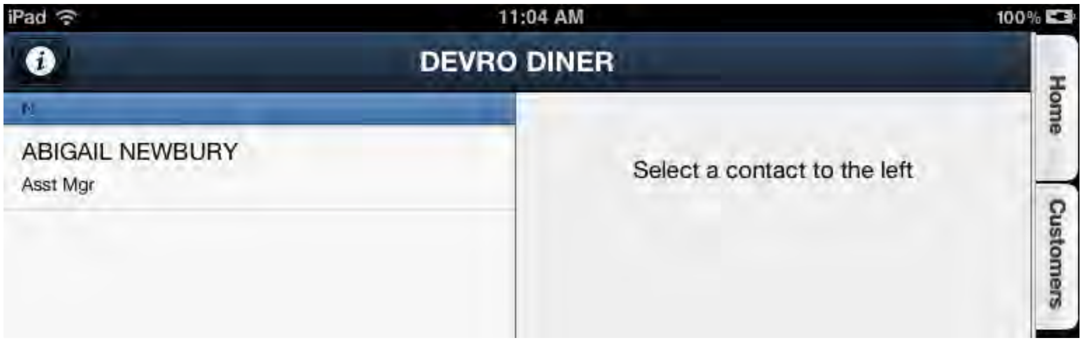
- **#63 Allow Salesperson to email reports -** Setting this option to "**Yes**" will allow the salesperson to email a PDF or Excel copy of a report.

- **#68 Enable "Special Order" guide in Standard Order.** Setting this option to "Yes" will add a "Special Order" guide to the guide drop down menu on the Standard Order tab in **EOP**. This new guide will *only* display items marked as "Special Order Item" on the "**Misc 1**" tab of Inventory File Maintenance in **entrée** that are *already* in the customer's standard order.

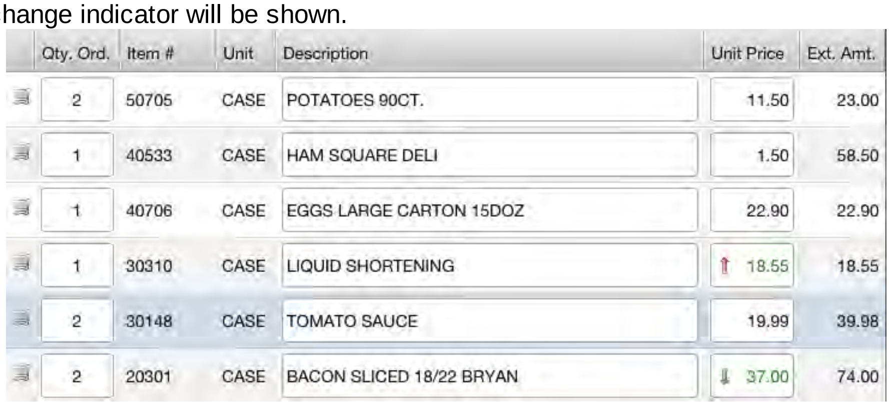
- **#69 Default the quantity ordered to 1 when entering items in Quick Entry.** Setting this option to "Yes" will automatically add items to the order with a quantity of 1 for items entered through the Quick Entry option.

- **#71 Allow Salesperson to View Contact Manager Contact Information.** Setting this option to "No" will *remove* the Contacts option from the main menu in the **Electronic Order Pad**. This means the Contact Manager's information can not be accessed from the **EOP** application.

  The default setting for this option is "**Yes**" so unless you change the setting it will allow access to the information about the contact person for each customer. The customer name will appear at the top center of the Contact Information screen.



- **#74 Display Price Change Indicator.** Setting this option to "Yes" will display a **green** down or **red** up arrow in front of the unit price if the current unit price is less than or greater than the last sale price to that customer in the **Electronic Order Pad** application. If no last sale price is available the price is treated as equal and no change indicator will be shown.



	Qty. Ord.	Item #	Unit	Description	Unit Price	Ext. Amt.
	2	50705	CASE	POTATOES 90CT.	11.50	23.00
	1	40533	CASE	HAM SQUARE DELI	1.50	58.50
	1	40706	CASE	EGGS LARGE CARTON 15DOZ	22.90	22.90
	1	30310	CASE	LIQUID SHORTENING	↑ 18.55	18.55
	2	30148	CASE	TOMATO SAUCE	19.99	39.98
	2	20301	CASE	BACON SLICED 18/22 BRYAN	↓ 37.00	74.00

- **#76 Allow Salesperson to Enter Credits on Orders.** Setting this option to "Yes" adds a Credits Tab to the Order Entry section of the Electronic Order Pad app (see the Credits Tab chapter for details) which allows for the entry of credit items to be included on the invoice when the order is imported into the main entrée system.

- **#77 Allow Salesperson to Create Credit Memos.** Setting this option to "Yes" will add the Create Credit Memo option to the main menu of the **Electronic Order Pad** app (see the Create Credit Memo chapter for details) which provides a trimmed down version of the current order entry process that only allows for the entry of credit items.

  The creation, completion, importing, and confirmation of Credit Memos follows the same work flow as orders except the document generated in **entrée** will be a Credit Memo rather than an Invoice.

  Several existing rules that apply to orders have been adjusted for Credit Memos to more closely match the rules used by entree as follows:
  - No the delivery date restrictions are applied to the selection of a Credit Memo Date. The only requirement enforced is that the date is not in the past.
  - Credit Memos may be created for customers on credit hold.

- **#78 Display "True" Inventory On Hand Information.** Setting this option to "Yes" enables the "OH Qty" field in the Item Information Panel of the Electronic Order Pad app. It displays both the current On Hand quantity as well as the True On Hand quantity which is calculated as On Hand + Allocations.

Note Remember to access the Information Panel configuration feature to add the **OH Qty** field to the Item Information Panel display.

- **#90 Allow Salesperson to create and edit customer special pricing.** Once enabled a new button with a green price tag icon will be displayed on the left side of the Item Information panel during order entry. Tap this button to display the current pricing information for the customer for editing, if no pricing is currently defined the salesperson will be prompted if they would like to create an entry. NOTE: Price changes are applied to the Ship To location that is being edited.

- **#91 Allow Salesperson to edit customer Bid 1 and Bid 2 pricing.** Once enabled a new button with a green price tag icon will be displayed on the left side of the Item Information panel during order entry. Tap this button to display the current pricing information for the customer for editing, if no pricing is currently defined the salesperson will be prompted if they would like to create an entry. NOTE: Price changes are applied to the Ship To location that is being edited.

- **#93 Default Price Level for catalog.** Allows you to set the price level used for price calculations when browsing the Catalog from the main menu. Previously the catalog was locked in at price level 1.

- **#108 Display Inventory on hand in the Electronic Order Pad.** Used to control display of this information. Setting this option to "YES" will enable the display of on hand inventory amounts in **Electronic Order Pad** (EOP).

- **#111 Allow promotions to be edited.** This option controls the overall ability for salespeople to edit the promotion amount passed on to the customer.

- **#112 Editable promotions will default to 0.** Setting this option to "Yes" will default the editable promotions to $0.00, instead of to the full promotion amount.

- **#113 Allow salesperson to edit promotion amount.** This option controls the ability for individual salespeople. Setting this option to "Yes" enables the ability for salespeople to edit the promotion amount passed on to the customer.

- **#114 Enable offline support during Order Entry.** Setting this option to "Yes" will enable support for switching to a limited order entry mode if network connectivity is lost during Order Entry. Offline support is only available during Order Entry and requires that an order has already been started. Orders cannot be started without network connectivity.

- **#116 Allow salesperson to access the Customer Falloff feature.** Setting this option to "Yes" will allow the salesperson to access the "Customer Falloff" feature.

- **#120 Allow Salesperson to access the Edit Special Pricing feature.** Once enabled a new "Special Pricing" menu option will be available on the main menu in . Then a salesperson may add or remove items and editing pricing based on the settings of System Option #90 Allow salesperson to create and edit customer special pricing and System Option #91 Allow salesperson to edit customer Bid 1 and Bid 2 pricing, (listed above).

- **#123 Allow salespeople to change the originating warehouse for an order.** Setting this option to "Yes" will allow the salesperson to change the originating warehouse for an order. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).
- **#124 Allow salesperson to change the shipping warehouse for items.** Setting this option to "Yes" will allow the salesperson to change the shipping warehouse individually for items on the order. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).
- **#125 Block completion of orders when items are not present in the shipping warehouse.** Setting this option to "Yes" will prevent the salesperson from completing orders that contain items that are not setup in the shipping warehouse assigned to the order. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).
- **#126 Lock items to the active shipping warehouse when added to the order.** Normally when the shipping warehouse is changed for an order all items are updated to ship from the newly selected warehouse. Setting this option to "Yes" will lock the shipping warehouse for the item to the warehouse that is selected when the item is added to the order. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).
- **#129 Default customer listing sort column.** Allows you to specify the default sort order for customer listings. Select from: Cust #, Company, City/State, SP# or Last Sale.
- **#130 Replace Class tab with a Category.** Setting this option to "Yes" the current Class tab will be replaced with a Category tab. Tapping on a Category from this list will then display a list of Classes from items in the selected Category. Tapping on a Class will then display all items within that Category and Class.

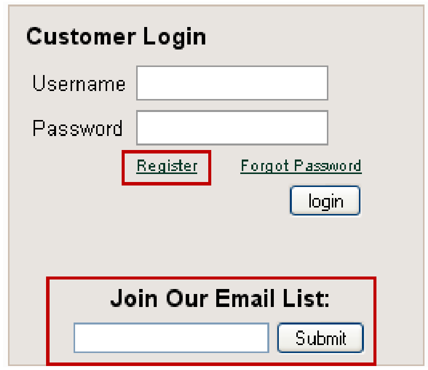
General

- **#11 Display Item images.** Turning this option off will prevent the display of item images.
- **#12 Display A/R information.** Turning this option off will hide all A/R panels and reports.
- **#13 Display .DOC scanned invoices.** When this option is enabled any available **entrée.DOC** scanned invoices will be available for viewing.
- **#15 Display inventory “On Hand” numbers.** Turning this option on will allow for the display of item "On Hand" values. This will add a "Qty Avail." field to option to the grids.
- **#16 Display item “Brand”.** Turning this option off will prevent the item "Brand" information from being displayed in the catalog.
- **#17 Display item “Weblink”.** Turning this option off will prevent the item "WebLink" information from being displayed.
- **#19 Enforce Credit Hold.** When this option is enabled **entrée.NET** will enforce the credit hold setting from entree and will prevent new orders from being placed.
- **#27 Display Class images.** Turning this option off will prevent the display of class images.
- **#30 Display item “Tags”.** When this option is enabled item tags defined in **entrée** will be listed in the "View" drop down on the "Catalog" page. See the Inventory File Maintenance chapter .**NET Tab** section of the **entrée System Guide** or the **entrée Knowledgebase** for more information about creating Item Tags.
- **#59 Display Brand images.** Setting this option to "Yes" will allow the Catalog to display brand images.

Note Prior to turning this option on the Brand Maintenance utility in the main **entrée** system must be used to build and load the brand name and image file (requires entrée 3.6.6). Then the brand name and image file must be exported to **entrée.NET** using the [Data Export Utility].

- **#73 Allow Registration Request on Login Page.** Set this option to "Yes" to display the "Register" button in the website Home page Customer Login area. The default setting for this option is “No”.

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



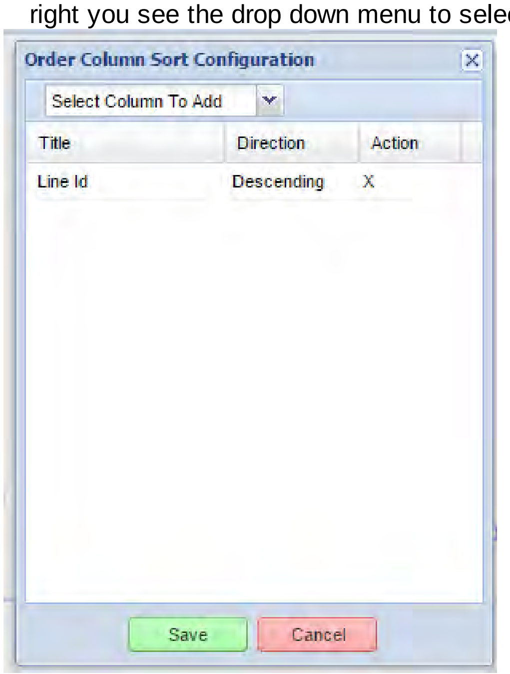
Note This feature does <u>not</u> automatically create a user account for the customer to login. You must manually approve and setup any new customer accounts.

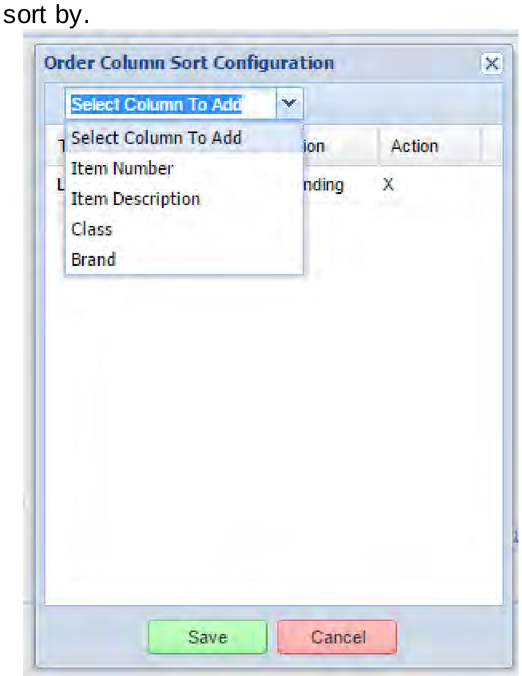
See the [Website Settings] chapter for more information.

- **#87 Disable Reporting.** Setting this option to **"Yes"** will disable and hide all reporting features.

- **#99 Use HTML formatting in order notification emails.** When this option is set to "Yes" order notification emails will contain an HTML formatted copy of the order similar in layout to the PDF generated when printing an order. When set to "No" order information will be formatted using plain text.

- **#110 Order confirmation item sort configuration.** This option allows you to specifying the sort columns and order for printed orders and order confirmations. Below you see the default settings on the left. On the right you see the drop down menu to select the columns to sort by.

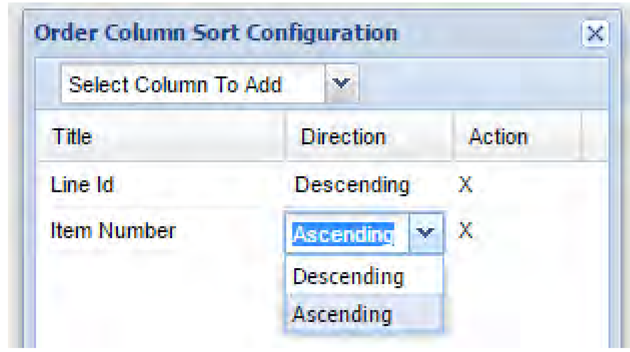




Then choose Ascending or Descending order.

Click the **X** in the Action column for a column to remove it.

Click **Save** to set your preferences.



- **#114 Enable offline support during Order Entry.** This feature provides your salespeople with the ability to continue placing an order when their network connection is lost by Electronic Order Pad. By default **System Option #114** is set to **Yes**. If you *do not want* Offline Mode enabled for your salespeople you must change the setting of this option to **No** here in **entrée.NET**.

Note <u>**EOP Offline Order Entry Mode Limitations**</u>

- Salespeople can *only* modify the current order.
- Only items in the customer's Standard Order or Order Guide are available in offline mode.
- Orders cannot be completed in offline mode.

* See the Electronic Order Pad System Guide Offline Order Entry Mode Overview chapter for details.

- **#118 Allow customer to edit Account Settings.** Setting this option to "No" will prevent the customer from editing their account settings. This controls access to the "Account Settings" includes the ability to change the accounts password, confirmation email address, timezone and other various account level options.

- **#119 Allow viewing and editing of Order Guides.** Setting this option to "No" will prevent the user from viewing or editing Order Guides.

<u>**Order Entry**</u> – These options control order entry rules and displays.

- **#1 Display price information.** Setting this option to "No" will not display any price information. When this option is set to "NO" the "Min order amount" and "Max order amount" options will NOT be enforced.

- **#2 Allow decimals in order quantities. This option requires System Option #15 "Allow decimals in invoices" to be enabled in entrée. Please refer to the description in entrée for more detailed information.** Turning this option on will allow decimals to be used in order quantities. (Ex: 0.5, 1.0, 1.5, 2.25).

- **#3 Display item last purchase information.** Turning this option on will make "Last Qty", "Last Price" and "Last Purchase Date" information available. **"Last Price" will not be shown if "Display price information" is set to "NO".**

- **#4 Can order any product.** The option has been updated to provide a mode which allows for viewing all items in the distributors catalog but only ordering items from the customers Standard Order.

There are 3 new choices for the "Can order any product" option:

1. "**Yes**" - This setting will display and allow for ordering of all items in the distributors catalog that are not otherwise excluded due to item restrictions such as the "Restricted" or "Approved" item options.
2. "**Restrict to Standard Order**". This setting retains the previous behavior when the option was set to "No". Only items that are present on the customer Standard Order will be displayed and allowed to be ordered.
3. "**Restrict To Standard Order (View All)**". This setting will display all items in the distributors catalog that are not otherwise excluded due to item restrictions such as the "Restricted" or "Approved" item options when browsing the "Catalog" section. Customers and salespeople will only be allowed to order items present on the customers Standard Order from the "Standard Order" and "Quick Entry" sections. Additionally all pricing will be hidden in the "Catalog" section regardless of the "**Show prices**" system option setting.

- **#5 Max order days.** This option sets the number of days in the future a customer is allowed to place an order for. As an example setting this option to "7" will only allow the customer to request a delivery date up to 7 days out from the date the order is placed. **Setting a value of "0" disables this feature.** **When the "Restrict delivery dates to customer route information" option is on only dates which fall within the "Max order days" window will be available.**

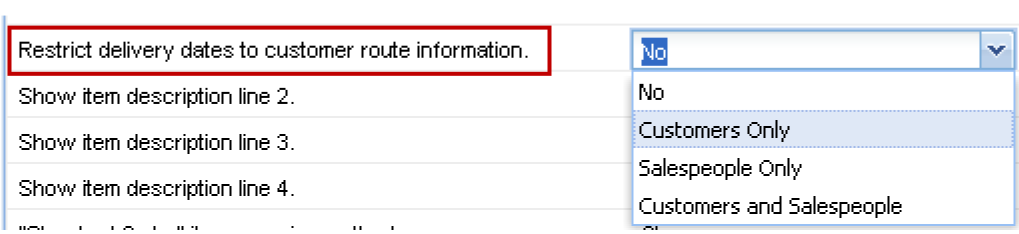
- **#6 Order cutoff time.** The "Order cutoff time" sets the time orders must be placed before to be eligible for next day or same day delivery. As an example, assuming no route restrictions are in effect, a customer placing an order on Monday with an "Order cutoff time" set to 4:00 PM will need to place their order before 4:00 PM for the system to allow them to select Tuesday as a requested delivery date. In this same example if the "Order cutoff time applies to day of delivery" option is on the customer would be allowed to select Monday as a requested delivery date for orders placed before 4:00 PM.

- **#7 Order cutoff time applies to day of delivery.** Turning this option on will have the "Order cutoff time" apply for the day of delivery. As an example, with no route restrictions are in effect, if the "Order cutoff time" is set to "10:00 AM" then customers will then be allowed to select the current day as a requested delivery date when placing an order before 10:00 AM.

- **# 8 Min order amount.** This option sets the minimum dollar amount total an order must meet to be completed and transmitted for completion. **Setting a value of "0" disables this feature. This feature has no effect when "Display price information" is turned off.**

- **# 9 Max order amount.** This option sets the maximum dollar amount total allowed for an order to be completed and transmitted for completion. **Setting a value of "0" disables this feature. This feature has no effect when "Display price information" is turned off.**

- **#10 Restrict delivery dates to customer route information.** This option has been changed from a "Yes" / "No" to allow for applying delivery date restrictions to: "**No**", "**Customers Only**", "**Salespeople Only**" or "**Customers and Salespeople**". This allows you to have complete control over how the delivery date restrictions are applied. It will prevent the Customers and / or Salespeople from selecting a requested delivery date that does not fall on a route day as defined on the "**Routes**" tab of "Customer File Maintenance" in **entrée**. If no route information or a "Standard" route has been defined in **entrée** this feature will have **no** effect for the customer.



Note The **Delivery Date Rule** options are also supported in the **Electronic Order Pad** as of version 3.3.7. The chart below provides a simple overview of the Delivery Date Rules options.

DELIVERY DATE RULE	DESCRIPTION	SETTINGS OPTIONS
Max Order Days.	Sets the number of days from the order date that the delivery date must fall within.	a. Enter a number value. b. Enter zero to disable rule.
Max Order Days enforcement.	Sets the order entry system response when the delivery date is beyond Max Order Days number.	a. Allow for next Delivery Date. b. Prevent Completion. c. Block Order Entry.
Order Cutoff Time	Sets the daily cutoff time for orders to be delivered the next day.	Select a time from the drop down list.
Order Cutoff Time Applies to Day of Delivery.	Sets the order cutoff time to apply to the day of delivery.	Yes / No
Restrict Delivery Dates to Customer Route Information.	Enforces the customer's defined route delivery days from the Customer file Route tab.	a. No b. Customers Only. c. Salespeople Only. d. Customers and Salespeople.

- **#20 Prompt for "Special Instructions".** Turning this option on will add a text entry box below the description line for customers to enter special instructions on a per-item basis. This will appear in the items "Description Line 2" on the invoice.

- **#21 Allow customer to specify delivery date.** Turning this option off will not allow the customer to set a delivery date.

Note If "**Show prices**" is enabled the displayed prices will be calculated using the next delivery date determined by the system.

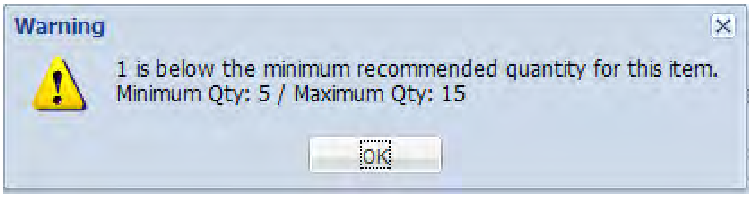
- **#22 Show Item description line 2.** Turning this option on will display an items second line of description in the order entry grid and allow the column on reports.

- **#23 Show Item description line 3.** Turning this option on will display an items third line of description in the order entry grid and allow the column on reports.

- **#24 Show Item description line 4.** Turning this option on will display an items fourth line of description in the order entry grid and allow the column on reports.

- **#36 Standard Order" item grouping method.** This option controls how items are grouped in the "Standard Order" grid. Selecting "None" will turn off all grouping. Selecting "Class" (default) will group items by class.

- **#37 Display min/max quantity warnings.** Setting this option to "YES" will display a warning message when ordering quantities above or below the specified values. **This feature serves as a warning *only* and does <u>not</u> prevent an order from being completed by the customer or salesperson. These entrée updates are required for the "Display min/max quantity warnings" Order Entry option:** The minimum and maximum quantity numbers **must** be defined in the main **entrée** system for the item or customer.



Defining minimum and maximum for Items in entrée

entrée V3

1. Go to **File** > **Inventory File Maintenance** > find the desired item.
2. Select the "**.NET**" tab.
3. In the **Order Entry** section and set your **Min Qty** and **Max Qty** quantities.
4. Then click **Apply**.

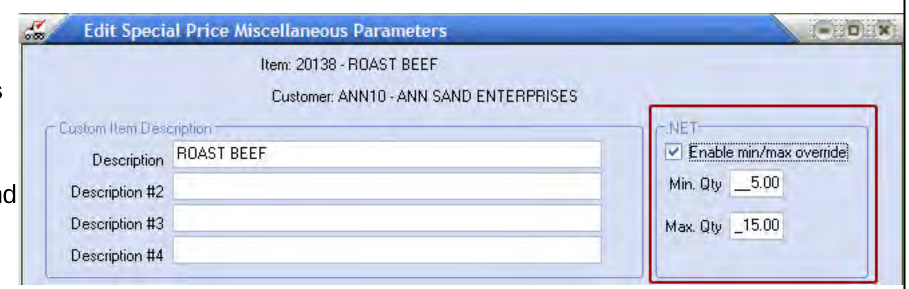
entrée V4 SQL

1. Go to the **Inventory** ribbon menu > click the **Inventory** option > find the desired item.
2. Select the **.NET Tab**.
3. In the **Order Entry** section and set your **Min Qty** and **Max Qty** quantities.
4. Then click **Apply**.

Defining minimum and maximum for Customers in entrée

entrée V3

1. Go to **File** > **Customer File Maintenance** > **Special Pricing Tab**.
2. Select the desired item's special price in the **Special Price Information** section.
3. Click the "**Edit miscellaneous** ..." button. The **Edit Special Prices Miscellaneous Parameters** dialog will display.
4. In the **.NET** section check "Enable min/max override" and enter the **Min Qty** and **Max Qty** quantities.
5. Then click **Apply**.



entrée V4 SQL

1. Go to the **Customer** ribbon menu > click the **Customer** option > find the desired customer.
2. Select the **Special Pricing Tab**.
3. Select the desired item's special price in the Special Price item grid.
4. Click the **Miscellaneous** button and the **Edit Special Price Miscellaneous Parameters** dialog opens.
5. In the **.NET** section check the **Enable min/max override** option.
6. Now set your **Min Qty** and **Max Qty** quantities.
7. Then click **Apply**.

- **#39 Show "Case Count" in order entry.** Setting this option to "YES will display "Total Cases:" with a quantity representing the sum of quantities entered for an order below the "Estimated Total" field in the shopping cart.

- **#47 Show DOT special order items.** Setting this option to "NO" will prevent DOT special order items from being displayed. (NOTE: This requires the **entrée.DOT** module.)

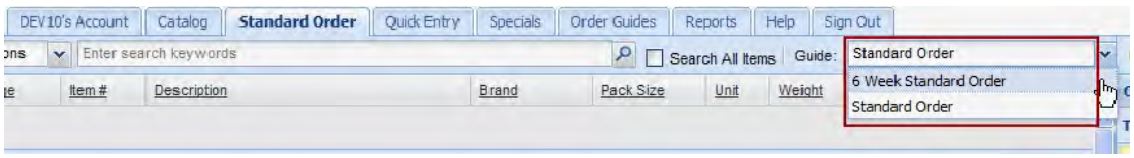
- **#48 Show DOT drop ship items.** Setting this option to "NO" will prevent DOT drop ship items from being displayed. (NOTE: This requires the **entrée.DOT** module.)

If you have the **entrée.DOT** module setting the two DOT options above to "YES" will enable the display of DOT items in the catalog with row color coding. The orange background color for "Special Order" items and a brown background color for "Drop Ship" items. This feature is *only* available for salespeople and will *not* be applied to the catalog for customers (see image below).

Note All items purchased from Dot Foods can flow into **entrée.NET** to provide you with even more selling opportunities. These options has been added to support **entrée.DOT** "**Special Order**" and "**Drop Ship**" items.

- **#49 Display warning for missing order quantity items.** Setting this option to "YES" will display a dialog during the complete order process showing all items with a minimum order quantity defined that are not on the current order. This is a notification only and does not prevent the order from being completed.

- **#55 Enable "Date Filtered Standard Order".** Setting this option to "YES" will enable the "Date Filtered Standard Order" feature. This feature allows DSRs and customers to view a copy of their "Standard Order" showing only items that have been recently purchased. This guide can be set as their default guide and is available in the Guide drop down menu (as seen in the image below in a salesperson's **entrée.NET** account.



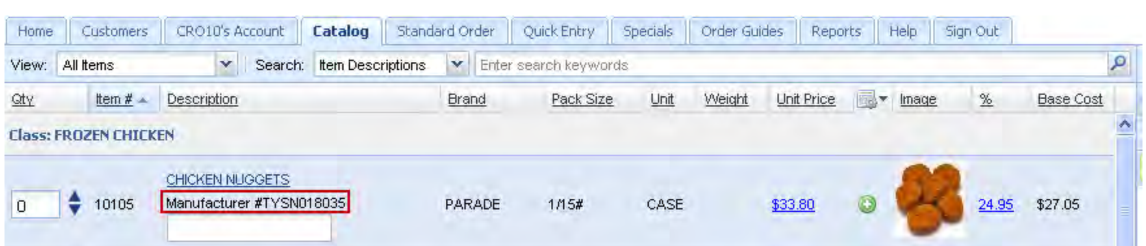
The number of weeks shown can is set in the "**Account Settings**" section of Home page after the salesperson or customer signs into the system. They can choose time spans from 2 to 12 weeks in one week increments.

- **#60 Min order weight.** This option sets the minimum weight restriction on customer orders. **Setting a value of "0" disables this feature.** The customer will be prevented from completing an order if the estimated order weight is below the minimum amount. A message will be displayed the yellow message area of the shopping cart (image on right).

- **#61 Max order weight.** This option sets the maximum dollar amount total allowed for an order to be completed and transmitted for completion. **Setting a value of "0" disables this feature.** The customer will be prevented from completing an order if the estimated order weight is above the maximum amount. A message will be displayed the yellow message area of the shopping cart.

Note For the Min/Max Weight feature to work correctly non-catchweight items must have a *constant weight* defined in **entrée**. The total weight for the order is estimated using the constant weight or the average weight for catchweight items.

- **#64 Display Manufacturer Item # beneath Item description.** When set to "**Yes**" it will display the manufacturer item number, if defined for an item in Inventory Maintenance in the main **entrée** system, below description line 1 in your Catalog (requires **entrée** version 3.6.7 or later or **entrée V4**). For information about Manufacturer Item # please consult the **entrée Knowledgebase** for your system in our website.



- **#65 Max order days enforcement.** This option allows you to control how access to the creation and completion of orders is handled when the customers next scheduled delivery date exceeds the "Max order days" setting above it in the options list. Previously when this condition occurred the system would allow for entry of an order only on the <u>next</u> scheduled delivery date.

You now have three choices for the Max order days enforcement option:

1. "**Allow for next Delivery Date**" - This setting keeps the current behavior the same and allows for entry of orders but only on the next scheduled delivery date.
2. "**Prevent Completion**" - This setting allows the salesperson or customer to view the item catalog and create an order but will prevent the order from being completed and transmitted to the main entrée system until the current date is within the allowed completion window determined as Next Delivery Date - Max Order Days.
3. "**Block Order Entry**" - This setting completely blocks all access to the order entry features of entrée.NET. Customers and salespeople will not be allowed to edit or create orders in the system until the allowed submission window determined as Next Delivery Date - Max Order Days.

- **#67 Display Featured Brand Advertisement in Shopping Cart.** Setting this option to "Yes" will display the featured brand information defined under the "Website - Featured Brands" section at the bottom of the shopping cart during order entry. When the customer clicks the **Shop Now** link in the shopping cart area they will be brought to the Catalog page with a list of all the products for that brand. See **Updating Blocks Content** to learn how to set up Featured Brands and see an example of the shopping cart option enabled.

- **#72 Require PayPal payment before allowing order to be completed.** Setting this option to "Yes" will require that the customer successfully complete a PayPal payment for the estimated order amount before allowing the order to be completed.

- **#75 Enable four decimal Unit Prices.** Setting this option to "Yes" will display and allow for the editing of Unit Prices with four decimal places.

- **#79 Use Future Pricing in Order Entry.** If this option to set to "Yes" when creating orders for a future date, the system will check the future price file to determine if a price change will be in effect for that day. If so, the system will automatically use the future price rather than the current price. **For entrée versions 3.6.17+ this option is set automatically to match System Option #50 - Use Future Pricing in Invoicing on the System Options tab of System Preferences in entrée**.

- **#80 Prevent sales of items marked as "Allow item to be sold at $0.00.".** Setting this option to set to "Yes" will override the "Allow item to be sold at $0.00" item setting from entrée. Items which do not have valid pricing will no longer be displayed and salespeople will no longer be able to sell the item at $0.00.

- **#82 Default delivery date to next scheduled delivery day.** Setting this option to set to "Yes" will default the delivery date for new orders to the next scheduled delivery date for the customer based on routing information defined in on the Routes tab in Customer File Maintenance.

Note This option has no effect when the "Restrict delivery dates to customer route information" option is enabled.

- **#84 Prevent entry of quantities exceeding the defined maximum warning quantity.** Setting this option to "Yes" will change the behavior of the maximum warning quantity defined for an item from a warning to a *strict enforcement*.

  This option has no effect on the minimum warning quantity for the item.
  The maximum quantity value can be defined on the ".NET" tab of "Inventory File Maintenance" and also per-customer through the "Edit Miscellaneous..." dialog of "Special Pricing".

Note **This option will override the maximum quantity checks for the "Show min/max quantity warnings" feature.**

- **#89 Create orders with Standard Order Quantities.** Enable this option to automatically build orders with items that have a non-zero standard order quantity defined for the requested delivery date.

- **#101 Use items from Special Price Customer for "Standard Order".** When this options is set to "Yes", and a Special Price Customer is assigned, then items in the customers special price file are replaced with the items defined for the Special Price Customer.

Note **This changes the effective customer used for all item restriction checks that verify an item is in a customers special price file to use only items defined for the Special Price Customer. This also affects the behavior of the standard approved and restricted item features.**

For example, if System Option #4 "Can order any product" is set to "Restrict to Standard Order" with this option enabled the customer will only be able to order items defined on the Special Price Customers Standard Order.

- **#104 Allow customer to delete items from their "Standard Order".** Setting this option to "YES" will allow the customer to mark items for deletion from their "Standard Order". This will remove the entry from the customer special price file the next time a data export to entree.NET is performed.

- **#105 Require Order Giver field before completing order.** Setting this option to "YES" will prevent the user from completing an order if the "Order Giver" field has not been filled in.

- **#106 Require PO# field before completing order.** Setting this option to "YES" will prevent the user from completing an order if the "PO #" field has not been filled in.

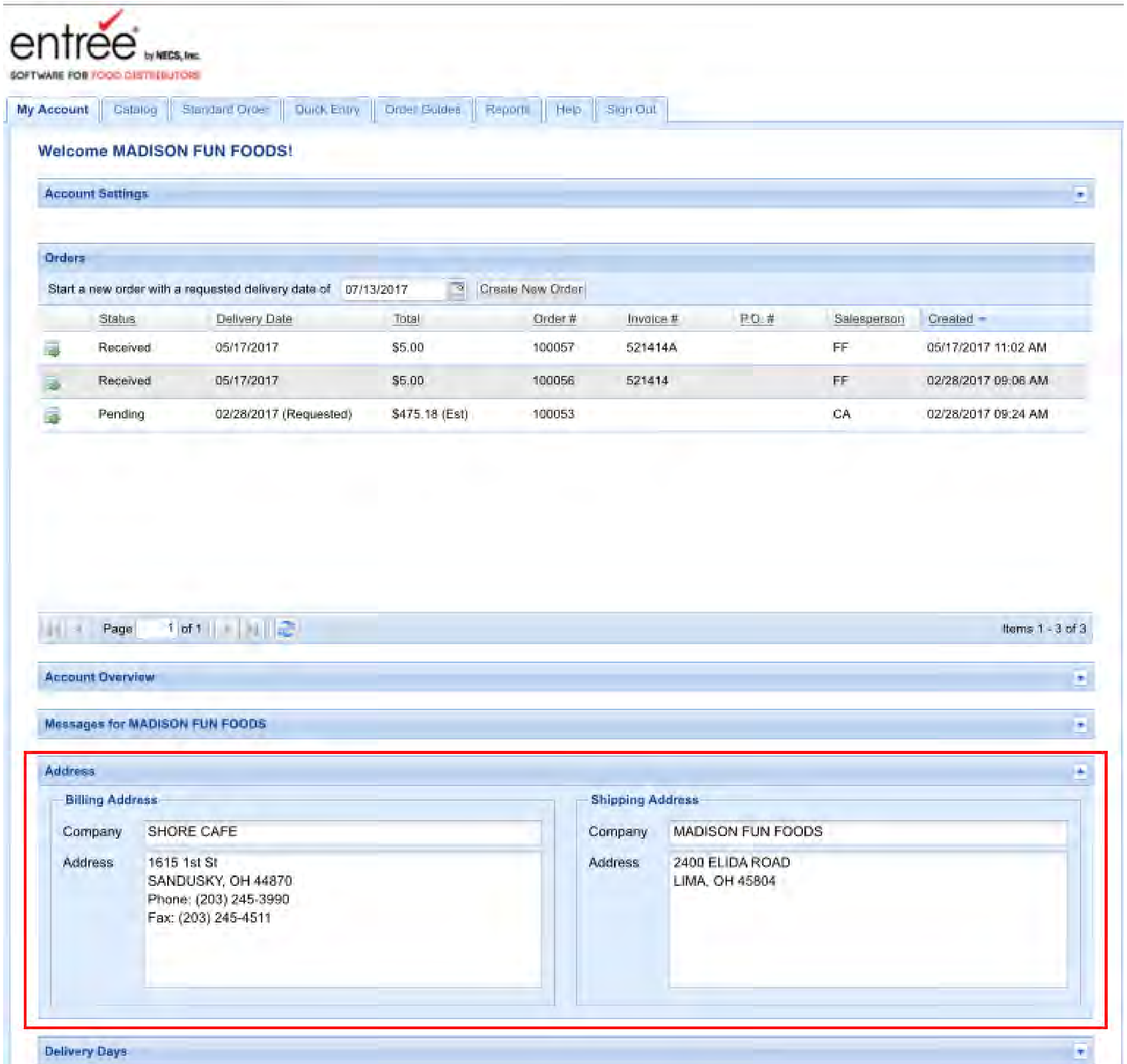
- **#107 Allow customer to edit order comments.** Setting this option to "No" will remove the ability for customers to enter comments on orders.

- **#109 Notify customers when an order is completed by the salesperson.** Setting this option to "Yes" will send a copy of the order notification to the email addresses assigned to the customer's **entrée.NET** account or the primary email address assigned in **entrée** Customer File Maintenance, if no online account is setup.The default behavior of the system *does not send* a copy of the order notification to customers when it has been completed by a salesperson.

- **#115 Allow "Bill To" customers to place orders for linked "Ship To" customers.** Setting this option to "Yes" will alter the order entry system to allow "Bill To" customers to view and place orders for all "Ship To" customers assigned to them.

Note This option allows for the Bill-To Master customers to login to entrée.NET and place orders for any of their Ship-To customers. All Ship-To customers *must be linked* to the master Bill-To in Customer File Maintenance in entrée using the Customer Tab > **Bill To Account** sub-tab.

Example Here you see what the entrée.NET customer will see in their My Account Address section with the Bill To Master feature in use.



- **#121 Can only order items available from the originating warehouse.** Setting this option to "Yes" will only allow items from the originating warehouse for the order to be viewed and added to the order. By default this is the warehouse assigned to the customer through Inventory File Maintenance. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).

- **#122 Display on hand information from the originating warehouse.** Setting this option to "Yes" will display the default On Hand and On Hand Weight information using only the inventory numbers from the active warehouse. When set to "No" the total inventory number for all warehouses will be displayed. (Requires entrée v4.0.35 or later and the **entrée.MW add-on module**).

- **#127 Disable promotions for customers receiving Bid Pricing.** Use this option to specify if promotions should be disabled for customers on items that are receiving bid pricing. This option is automatically set by the export process to the same value set for entrée System Option #200 "Disable promotions for customers receiving bid pricing".

- **#128 Display items with no On Hand inventory.** Allows you to control the display of items with no on hand inventory. Setting this option to "Yes" will show items with *NO On Hand inventory* in the order entry screens. Setting this option to "No" will hide items with a zero or negative on hand inventory value.

Promotions – These option control the display and rules for the promotions.

Promotions			
41	Disable promotions below Selling Price.	Yes	Set by entrée System Option #86
42	Disable promotions for customers receiving special or bid pricing.	No	Set by entrée System Option #170
45	Allow a Promotion to be applied to a Break Price.	No	Set by entrée System Option #172

- **#41 Disable promotions below Selling Price.** If this option is set to "YES", the system will disable an item promotion (as defined off the Promo window in the inventory file) if the customer's sell price is less than their normal pricing.

  Example Let's assume a case of pizza sauce has a promotion of $1/case an the customer's normal price is $16.50. If for some reason (salesman gives him a deal on this item) he is invoiced $16.25 instead, he will NOT receive the promo discount if this option is set to YES.

- **#42 Disable promotions for customers receiving special or bid pricing.** When set to "YES", any customer already receiving a bid or special price on an item eligible for a promotion, will not receive promotional pricing for the given item.

- **#45 Allow a Promotion to be applied to a Break Price.** When set to "YES" the system will allow a promotion to be applied to a break price. The settings in **entrée.NET** is automatically based upon the current settings in system option #172 in **entrée**.

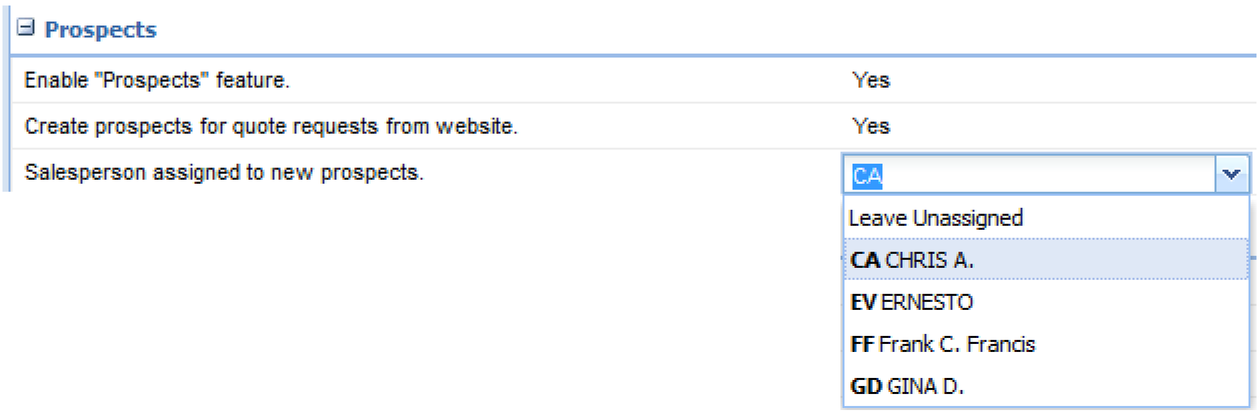
Note Some distributors view BOTH features as being "promotions" and do not want both to be applied to the same invoice line item. To allow only one “promotion” per item, set this option to “**No**”. Then for any item which is currently assigned a Break Price, no Promotions will be applied.

Prospects – These options control the display and rules for the **Prospects** feature.

- **#31 Enable “Prospects” feature.** Setting this option to "YES" will allow salespeople to create and manage "Prospects". Three new tabs will be added to your menu once this feature is enabled; **Prospects**, **Manager Setup** and **Reports**.

- **#33 Create prospects for quote requests from website.** Setting this option to "YES" will automatically create a prospect when a visitor submits a quote request from the website. **This option has no effect when the "Enable Prospects feature" is set to "NO".**

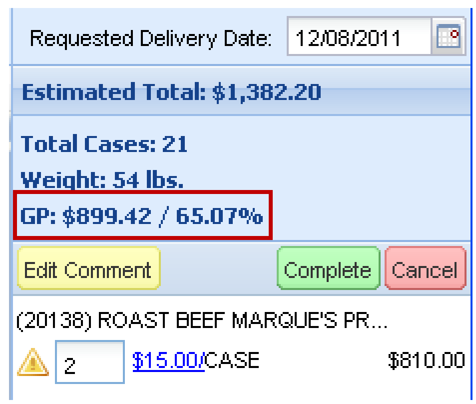
- **#34 Salesperson assigned to new prospects.** Designates a salesperson that will be assigned to prospects created from website quote requests. **This option has no effect when the "Enable Prospects feature" or "Create prospects for quote requests from website" is set to "NO".**



Salespeople - These options control the display and rules for Salespeople with accounts in **entrée.NET**.

- **#14 Allow salespeople to setup entrée.NET accounts for customers.** Turning this option on allows salespeople to setup **entrée.NET** accounts for customers. This provides the same account setup feature available to the distributor and is limited to the customers assigned to the salesperson.

- **#18 Display "Gross Profit".** Setting this option to "YES" will display the GP dollars / percentage values in the top of the cart while a Salesperson is creating an order. Applies to Salespeople only.



- **#25 Allow salesperson to modify pricing.** Turning this option on will allow the salesperson to modify prices on an order.

- **#26 Allow salesperson to enter prices below the "Minimum Sell Price".** Turning this option on will allow the salesperson to enter prices below the "Minimum Sell Price" defined on the "**Cost/Price**" tab of "**Inventory File Maintenance**" - This option has no effect when "Allow salesperson to modify pricing." is turned off.

- **#28 Email a copy of orders placed by customers to the salesperson.** Turning this option on will email a copy of the order notification to the salesperson assigned to the customer's account.

- **#29 Salesperson can view and place orders for all customers.** Turning this option on will allow the salesperson to view and place orders for all customers. The "**Receives data for ALL salespersons**" option in the **entrée Salesperson/Broker File Maintenance Remote Order Entry** tab will override the "Salesperson can view and place orders for all customers" option when set to "No".

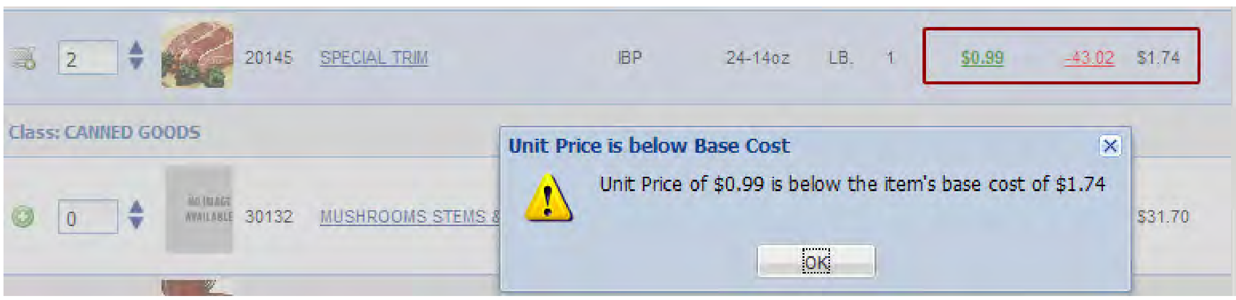
  ***** See the **Setting entrée Options** chapter for a complete explanation of how to use the new **Salesperson / Broker File Maintenance Remote Order Entry** options.

- **#32 Allow salesperson to re-assign prospects.** Setting this option to "YES" will allow a salesperson to re-assign a prospect to a different salesperson. **This option has no effect when the "Enable Prospects feature" is set to "NO".**

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

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

- **#38 Allow salesperson to enter prices below "Base Cost".** Setting this option to "YES" will allow the the salesperson to enter prices below Base Cost.
Setting this option to "Display Warning" will display a warning dialog and allow the price to be entered.
Setting this option to "NO" will prevent the price from being accepted.



- **#43 Display Commissions.** (Electronic Order Pad) Applies to salespeople only. Turning this option on will enable the display of estimated commissions calculations for orders.

- **#46 Allow salesperson to delete items from a customer's "Standard Order".** Setting this option to "YES" will allow the salesperson to mark items for deletion from a customers "Standard Order". This will remove the entry from the customer special price file the next time a data export to **entrée.NET** is performed.

- **#56 Enforce credit hold for salespeople.** When this option is enabled **entrée.NET** will enforce the credit hold setting from **entrée** and will prevent new orders from being placed by salespeople.

- **#81 Display customer Hot Message.** Setting this option to set to "**Yes**" will display the hot message defined for the customer when selecting a customer.

- **#83 Show warning if Unit Price is below Base Cost when adding items.** Setting this option to set to **"Yes"** will display an alert to the salesperson if the calculated Unit Price is below the Base Cost for the item when adding an item to an order.

- **#92 Prevent selling below Base Cost.** Under normal operation the system will never change a price that has been calculated for a customer even if the price is below the items Base Cost. Setting this option to "Yes" will modify the below cost checks to prompt the salesperson and force the price to the items Base Cost. This compliments the "Prevent selling below Base Cost" miscellaneous password option in **entrée**.

- **#94 Allow Salesperson to view Real Cost.**
- **#95 Allow Salesperson to view Landed Cost.**

Each of the three cost viewing options will be enabled individually as the column is added to the Item Information Panel in **entrée**.

- **#96 Allow Salesperson to view Market Cost.**

Otherwise the cost viewing option will not appear in the options list.

- **#97 Calculate Gross Profit using Landed Cost.** Setting this option to "Yes" will change the gross profit calculations from using Base Cost to Landed Cost.

- **#98 Invoicing deducts bill back amount when calculating Gross Profit.** Setting this option to "Yes" will change the gross profit calculations to account for vendor bill backs.

- **#100 Show DOT item filter.** When this option is set to "Yes" a button with the Dot logo will be added near the search controls in the Catalog section. This button provides special filtering options to control the display of Dot items while browsing the catalog. This filter is available on the Order Guide / Product Listing report.

- **#102 Allow salesperson to modify prices for customers on Price level 1.** When this option is set to "No" price editing will be disabled in when the customers price level is not set to level 1.

Note **The "Allow salesperson to modify pricing." option overrides this setting.**

- **#103 Allow salesperson to modify prices for customers on Price level 2 - 99.** When this option is set to "No" price editing will be disabled in when the customers price level is not set to a levels 2 through 99.

Note **The "Allow salesperson to modify pricing." option overrides this setting.**

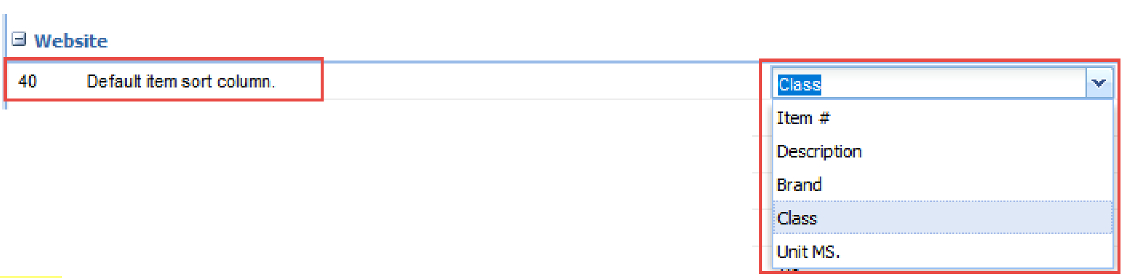
- **#117 Allow Special Pricing to override the Minimum Sell Price.** Used to specify if Special Pricing is allowed to override the Minimum Sell Price. This option is automatically set by the export process to the same value set for entrée System Option #177 " Special Pricing is allowed to override Minimum Sell Price".

Website

Website

40	Default item sort column.	Class
44	Display Website Blog	Yes
57	Enable display of banner ads.	Yes
62	Display Manufacturer Item Number in item Catalog.	Yes
85	Verticle Scrollbar for Popup Catalog	Yes
86	Show On Hand Quantity	No

- **#40 Default item sort column.** Designates the column to use by default when sorting the item listing in the website product catalog.



Note When "**Item #**" is selected the catalog will list all items and <u>disable</u> the grouping by class and brand as it sorts in the selected direction.

- **#44 Display Website Blog.** Selecting "**Yes**" will turn this option on and add the Blog link to the website main menu in your website. Use the **Website** tab Blocks section **[Blog feature](#)** to add content to your Blog.

- **#57 Enable display of banner ads.** Selecting "**Yes**" will turn this option on for your website. See the **Ads** section of this chapter to use this feature.

- **#62 Display Manufacturer Item Number in Item Catalog.** When set to "**Yes**". It will include the manufacturer item number, if defined for an item in the main **entrée** system, below the item description when browsing the Catalog page of the website.

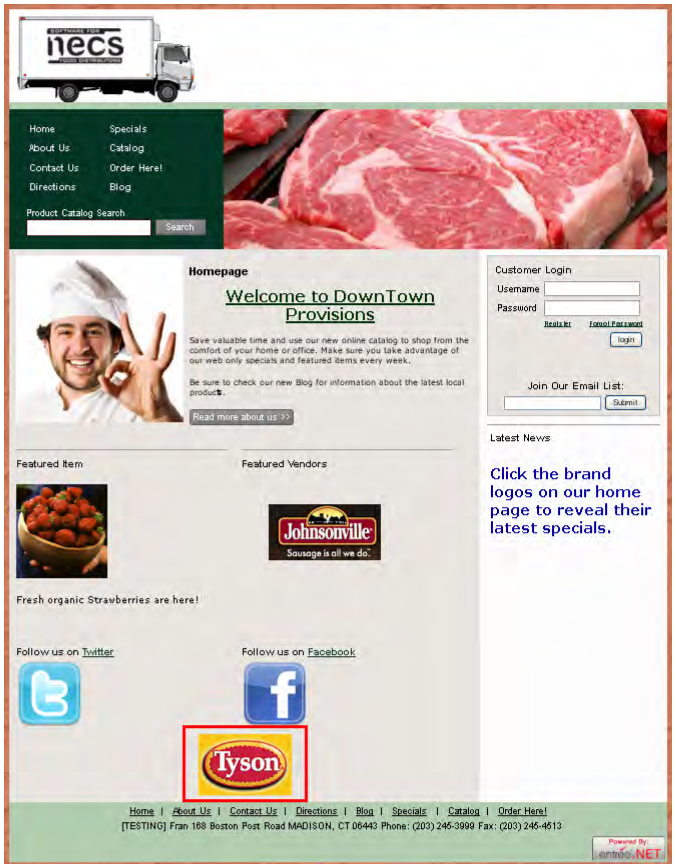
- **#85 Vertical Scrollbar for Popup Catalog.** Turning this option on will condense the item areas of your catalog and implement a scrolling feature, rather than listing down the page.

- **#86 Show On Hand Quantity.** Turning this option on or off will toggle the display of on hand quantities for items.

5.2 Ads

Banner Ads

The "Advertisement" system allows distributors to upload advertisements with links to related information their website Home page (outlined in red on the Home page below is the **Brand** with Tyson logo selected as the advertisement with the position set to ‘Bottom of Page’).



Facts About Ads

Advertisements are managed by the System Administrator in the **Settings** tab using the **Ads** button.

- Ad images can be created using any graphic or photo editing software.
- There are no image size restrictions from the images uploaded for advertisements. This allows you to use any shape and size image for your ad. Previously ad images were required to be **675w x 90h** in pixels saved as **jpg** or **png** image files.
- When the advertisement image is clicked the customer will be brought to the catalog page displaying all the items with the selected **Brand**, **Class**, **Specials** or **Item Tag**.
- Once one or more banner ads have been defined the images for these ads will be displayed in rotation on the website home page when a page refresh is done.
- **An Important Note:** Since your current advertisements are randomly selected from the **Ads** listing for display on your home page, once an advertisement has expired it must be deleted from your **Ads** list. This will prevent expired advertisements from displaying on your website home page.

Need Help Creating Ads

If you need help creating your banner advertisements for a small fee, we can create professional looking graphics for your banner. Please contact the NECS Sales Department at sales@necs.com for assistance.

First, Enable the Ads Feature

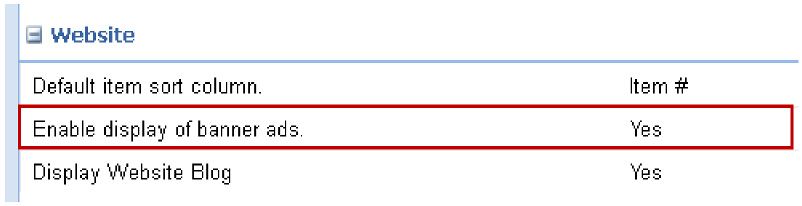
To use the **Ads** feature you must first enable it using the **Options** button:

1. Click the **Settings** tab.

2. Click the **Options** button.

3. Scroll down to the **Website** section.

4. Set the "Enable display of banner ads." system option to "**Yes**".

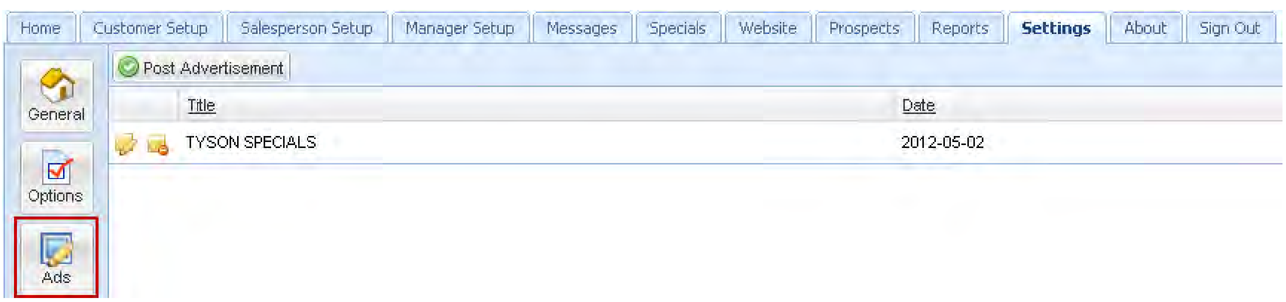


Second, Post Your Ad

Note **Before you begin this post process your ad should have been designed and saved as a jpg or png image file on your computer.**

1. Once your advertisement is ready to post click the **Settings** tab.

2. Click the **Ads** button and the ads management screen will display any saved ads which are listed by **Title** and designated start **Date**.



3. Use the **Edit** and **Delete** tools in the left column to manage your saved ads.

- To **Edit** an existing ad: Select the ad from the list and click the edit icon  with the pencil. The **Post Advertisement** dialog will open, make your changes and click **Post**. Be sure to check the value of **Date**, the "start date" for the ad before re-posting it.

- To **Delete** an existing ad: Select the ad from the list and click the delete icon  with the red minus sign. The Delete Ad? confirmation dialog box will display. Click **Yes** to remove the selected ad from the list.

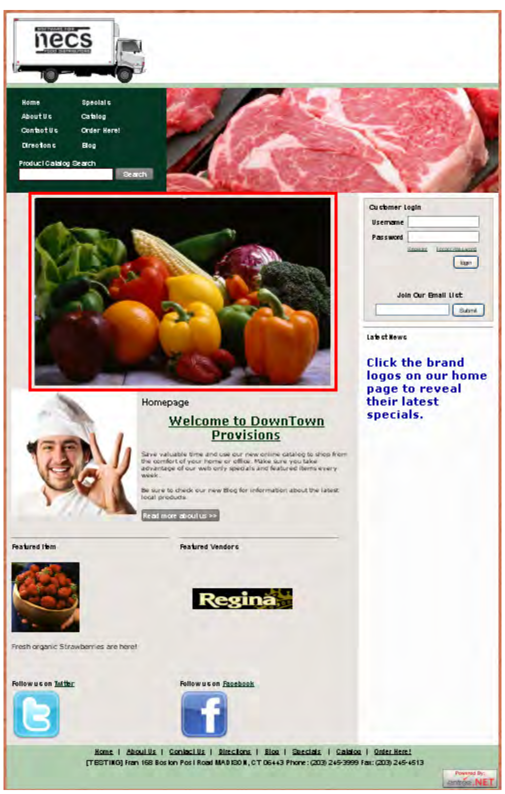
4. **To post a new ad:** Click the **Post Advertisement** button to open the dialog.

   All fields in the **Post Advertisement** dialog are required.

5. Enter a **Title**. In our example the related holidays and the year were used.

6. Select a **Date** using the calendar. This will be the "start date" for your ad. The website will post your ad on the home page on this date.

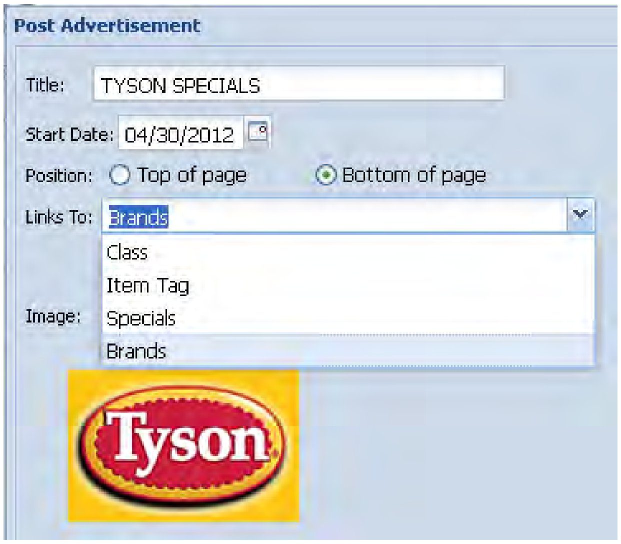
7. **Position:** Set the position of the advertisement image on your website home page using the this option. Select to display your advertisement image either at the **Top of page** (left) or the **Bottom of page** (right) of your website home page as seen in the images outlined in red on the Home pages below for a **Class** of Produce.

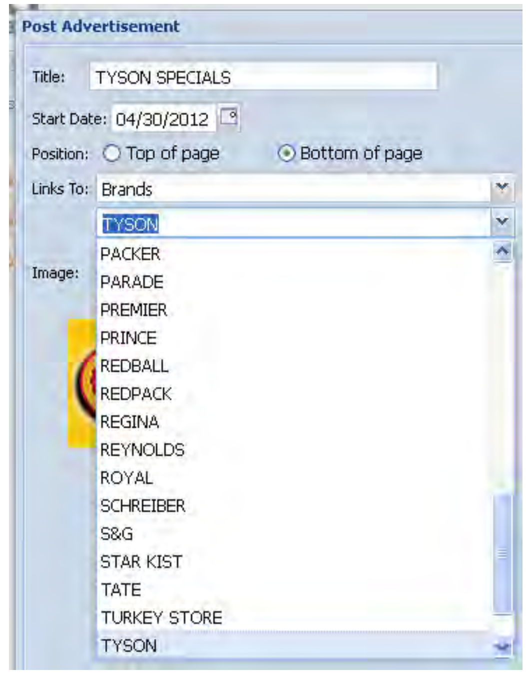


Top of page

Bottom of page

8. Make a selection for the **Links To:** drop down list. Your options are: **Class**, **Item Tag**, **Specials**, or **Brand**.

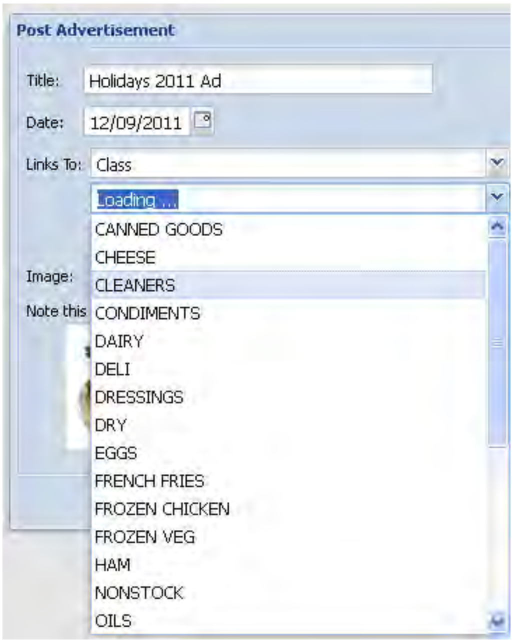




When **Brand** is selected you will select your Brand from the drop down list below as shown in the image on the right. This Brand list is populated from the Brands information in the main **entrée** system in Brand Maintenance.

- The **Specials** option will link the ad to your website **Specials** page. In the example below Tyson Specials will be advertised.

- The **Class** option will display a secondary drop down list for you to select the related class. The class list reflects the classes you have set up in your main **entrée** system.
- The **Item Tag** option will display a secondary drop down list for you to select the related Item Tag. The item tag list reflects the item tags you have set up in your main **entrée** system.



9. For the **Image** option click the **Browse** button to find your saved ad image file on your computer. If you have **Brand** images defined you can use those images in your ad.

10. Click to select the image file in the directory on your computer and then click the **Open** button.

11. Then in the **Post Advertisements** dialog click the **Upload** button . The image will then be loaded and displayed in the dialog. The "Image Uploaded" message will display in the image selection box to indicate the upload was successful.

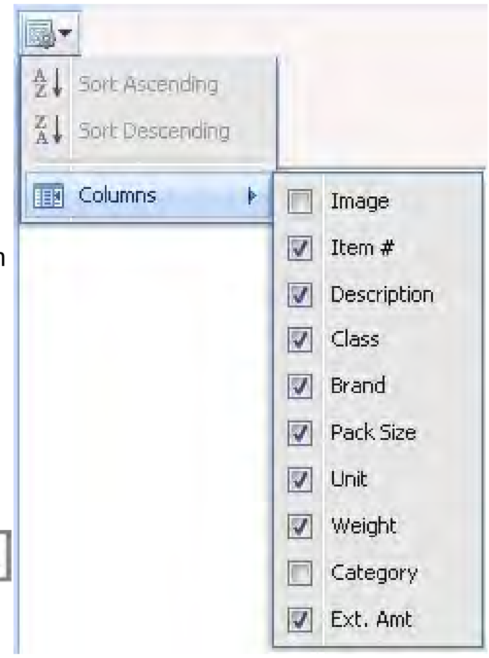
Note Only <u>**one**</u> image per advertisement can be uploaded. Once an advertisement has expired it <u>must be deleted</u> from the **Ads** list.

12. Click the **Post** button at the bottom of the **Post Advertisement** dialog screen and your new advertisement will be listed in the ads management screen. Once you create the new advertisement and **Post** it the ad will appear on the home page of your website on the designated start date.

5.3 Grids

Grid Settings

entrée.NET allows you to customize the display of column information in the Standard Order, Search and Quick Entry Grids.



1. Use the **Select Grid** drop down menu to choose the grid to customize.

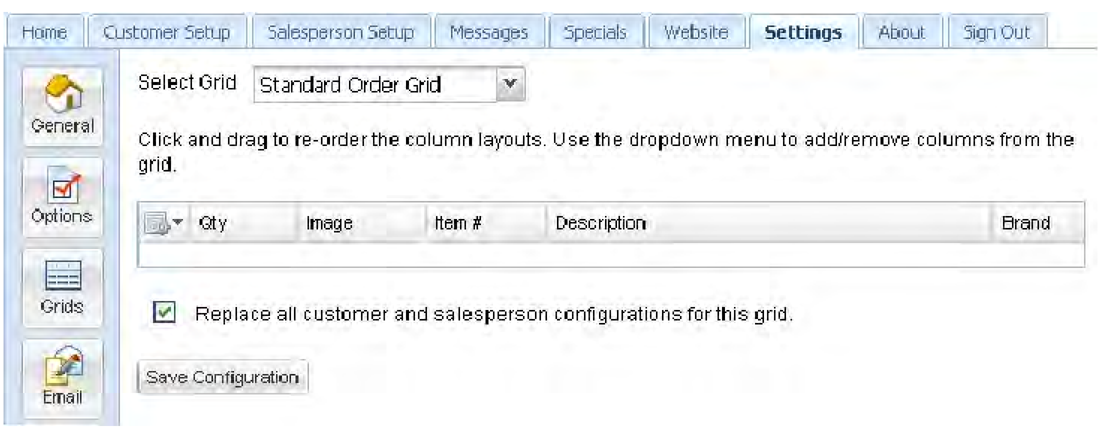
2. Click and drag column names to reorder and move them to their new locations.

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

4. If you want to remove all the custom grids your customers and salespeople have defined, the click the box to "**Replace all customer and salesperson configurations for this grid.** " Leaving this box unchecked will only affect new customers and salespeople added after you save this configuration.

Warning: It is advised that you **NOT CHECK** this box if your **entrée.NET** system has been in use for a while, as customers and salespeople will lose the grid settings they took time to customize.

5. Click the **Save Configuration** button  to save your changes.



This image of the Grids option page in the Settings tab has the "Replace all customer and salesperson configurations for this grid" option checked.

5.4 Email

Email Settings

Using email to communicate with your **entrée.NET** customers could not be easier. We provide you with all the email templates you need to get you started. Just add a few pieces of information and the template is customized and ready to serve your business needs.

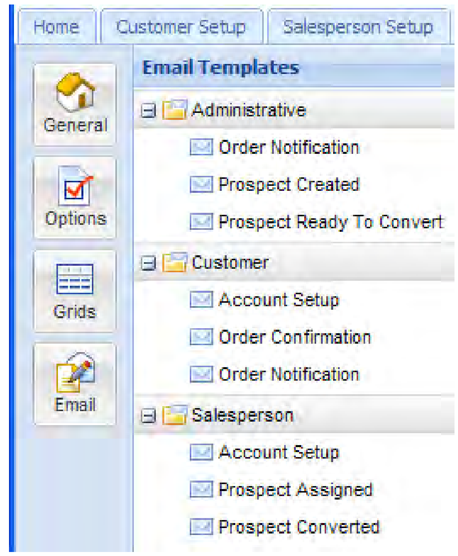
Email Templates

You have been provided with all the templates you will need to support your **entrée.NET** system.

Special tags have been created to fill in the essential system information in the emails.

Use the templates as they are or edit the subject and body of the email templates to suit your business style. Just be sure to always incorporate the special tags associated with that template in the body of your emails.

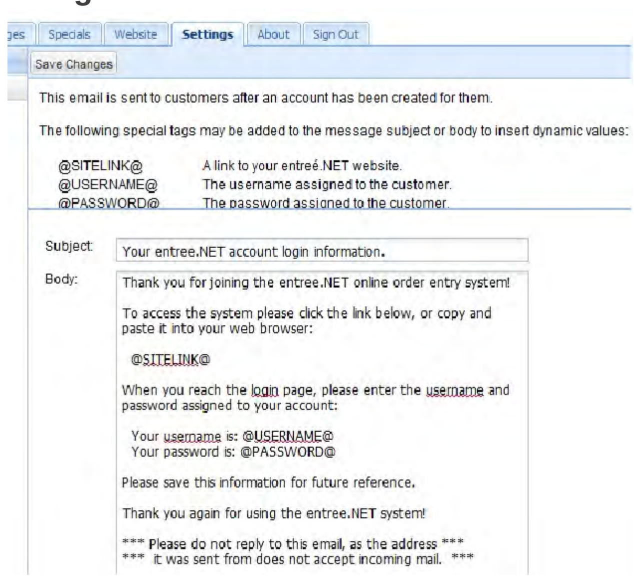
entrée.NET will automatically correspond with your customers, salespeople or system administrator via email messages.



Email messages are sent for the following situations:

- **Customer Account Setup**

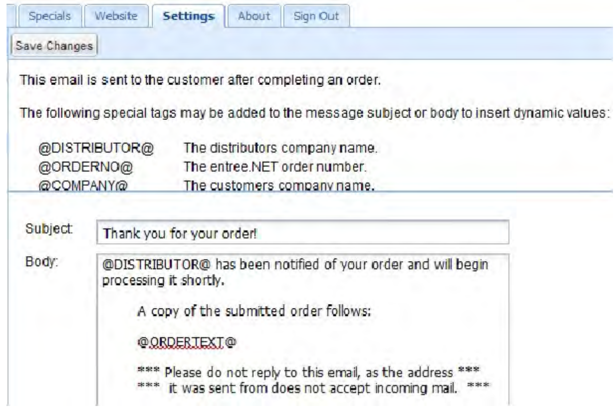
  This email is sent to your customers after an account has been created for them. Your customers will receive their username and password to access online ordering. Customer account creation will be covered in the [Customer Setup](#) chapter.



- **Customer Order Notification**

This email is sent to your customers once they complete their order and **BEFORE** you confirm their order.

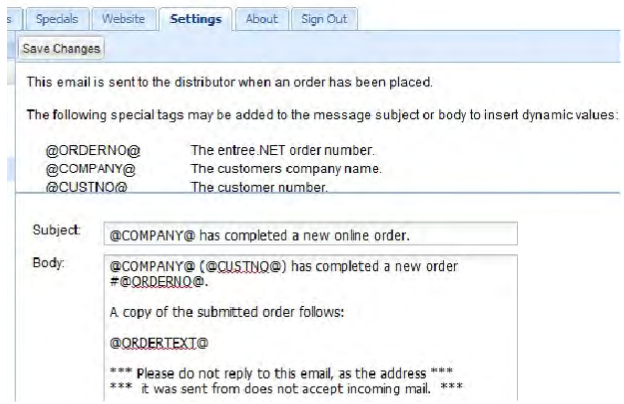
A PDF copy of the order will be included with this email and is displayed below.



- **Distributor Order Notification**

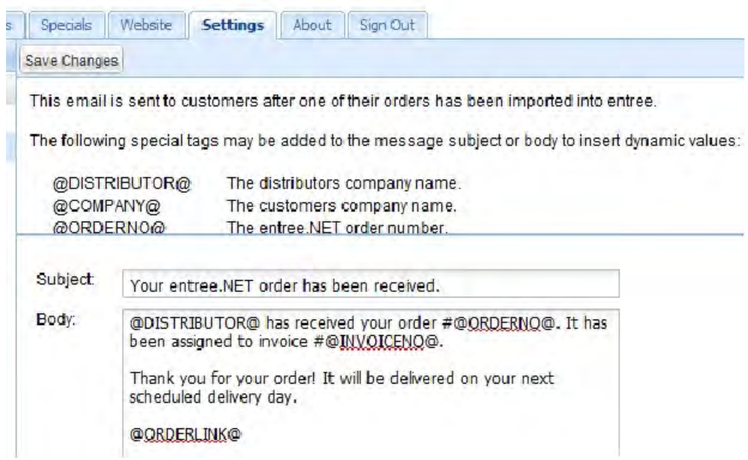
This email is sent to you when an order has been placed.

The email addresses you entered for your company in the **Settings** tab > **General** options > **Email Notifications** field will receive these emails.

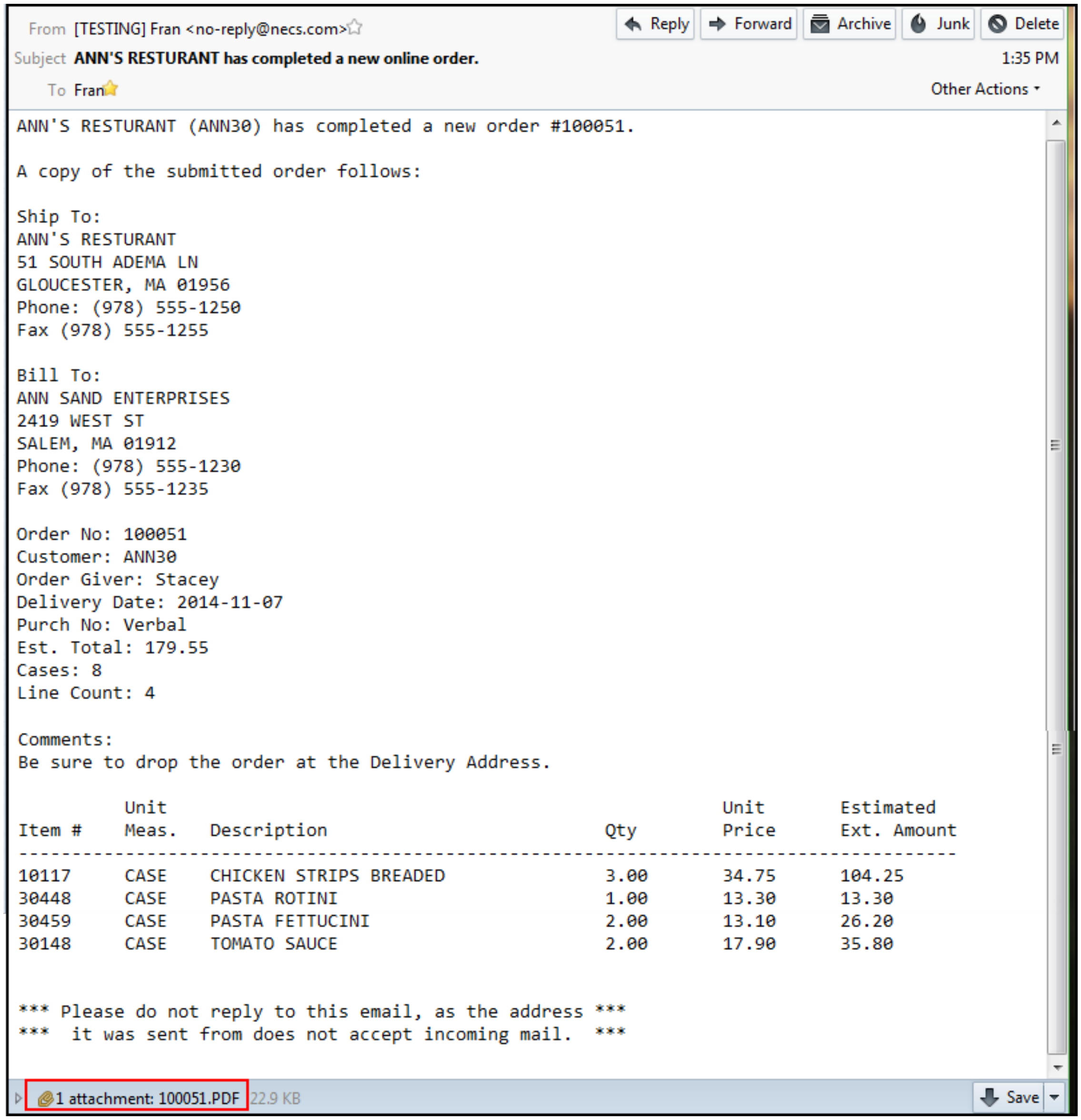


- **Customer Order Confirmation**

This email is sent to your customers after one of their orders has been imported into the main **entrée** system.



Example This is the Order Notification email that will be sent to the customer. The online order is in the attached PDF file.



From [TESTING] Fran <no-reply@necs.com>
Reply | Forward | Archive | Junk | Delete
Subject **ANN'S RESTURANT has completed a new online order.**
1:35 PM
To Fran
Other Actions

```
ANN'S RESTURANT (ANN30) has completed a new order #100051.

A copy of the submitted order follows:

Ship To:
ANN'S RESTURANT
51 SOUTH ADEMA LN
GLOUCESTER, MA 01956
Phone: (978) 555-1250
Fax (978) 555-1255

Bill To:
ANN SAND ENTERPRISES
2419 WEST ST
SALEM, MA 01912
Phone: (978) 555-1230
Fax (978) 555-1235

Order No: 100051
Customer: ANN30
Order Giver: Stacey
Delivery Date: 2014-11-07
Purch No: Verbal
Est. Total: 179.55
Cases: 8
Line Count: 4

Comments:
Be sure to drop the order at the Delivery Address.

         Unit                                          Unit       Estimated
Item #   Meas.   Description                   Qty     Price      Ext. Amount
------------------------------------------------------------------------------
10117    CASE    CHICKEN STRIPS BREADED        3.00    34.75      104.25
30448    CASE    PASTA ROTINI                  1.00    13.30      13.30
30459    CASE    PASTA FETTUCINI               2.00    13.10      26.20
30148    CASE    TOMATO SAUCE                  2.00    17.90      35.80


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

1 attachment: 100051.PDF 22.9 KB
Save

Example This is the customer's online order PDF which is attached to the order confirmation email sent to the customer. Notice the **Bill To** and **Ship To** addresses, the addition of the **Order Giver** field, Phone and Fax numbers.

necs | entrée

Online Order
Printed: 11/07/2014 01:35 PM
Status: Pending transfer to distributor.
Order Giver: Stacey

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

Bill To:

ANN SAND ENTERPRISES
2419 WEST ST
SALEM, MA 01912
Phone: (978) 555-1230
Fax (978) 555-1235

Ship To:

ANN'S RESTURANT
51 SOUTH ADEMA LN
GLOUCESTER, MA 01956
Phone: (978) 555-1250
Fax (978) 555-1255

Customer No.	Order Number	Customer Purchase Order	Order Date	Req. Delivery Date	Invoice No.
ANN30	100051	Verbal	10/15/2014	11/07/2014	PENDING

Item Number	Qty Ord	Unit Meas	Pack Size	Description	Brand	Unit Price	Estimated Ext. Amount
10117	3.00	CASE	1/10#	CHICKEN STRIPS BREADED	PARADE	34.75	104.25
30448	1.00	CASE	20#	PASTA ROTINI	PRINCE	13.30	13.30
30459	2.00	CASE	1/20#	PASTA FETTUCINI	PRINCE	13.10	26.20
30148	2.00	CASE	6/10	TOMATO SAUCE	PARADE	17.90	35.80

Pricing is estimated and subject to change.

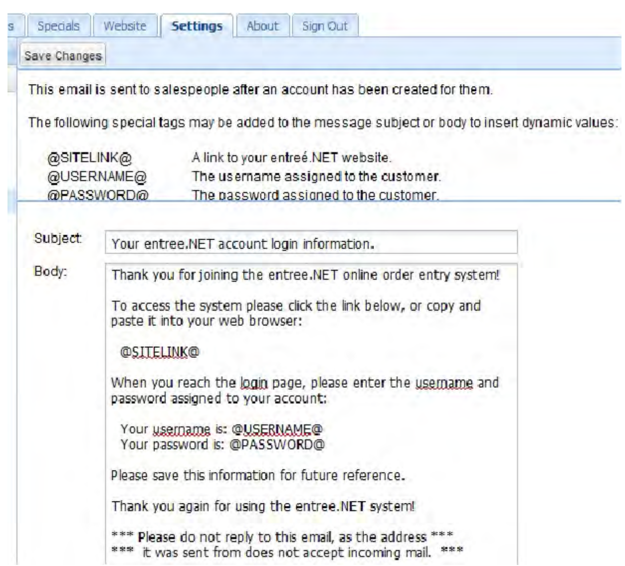
Estimated Total
179.55

Comments for distributor:

Be sure to drop the order at the Delivery Address.

- **Salesperson Account Setup**

This email is sent to salespeople after an account has been created for them. Salesperson Account creation will be covered in the **Salesperson Setup** chapter.



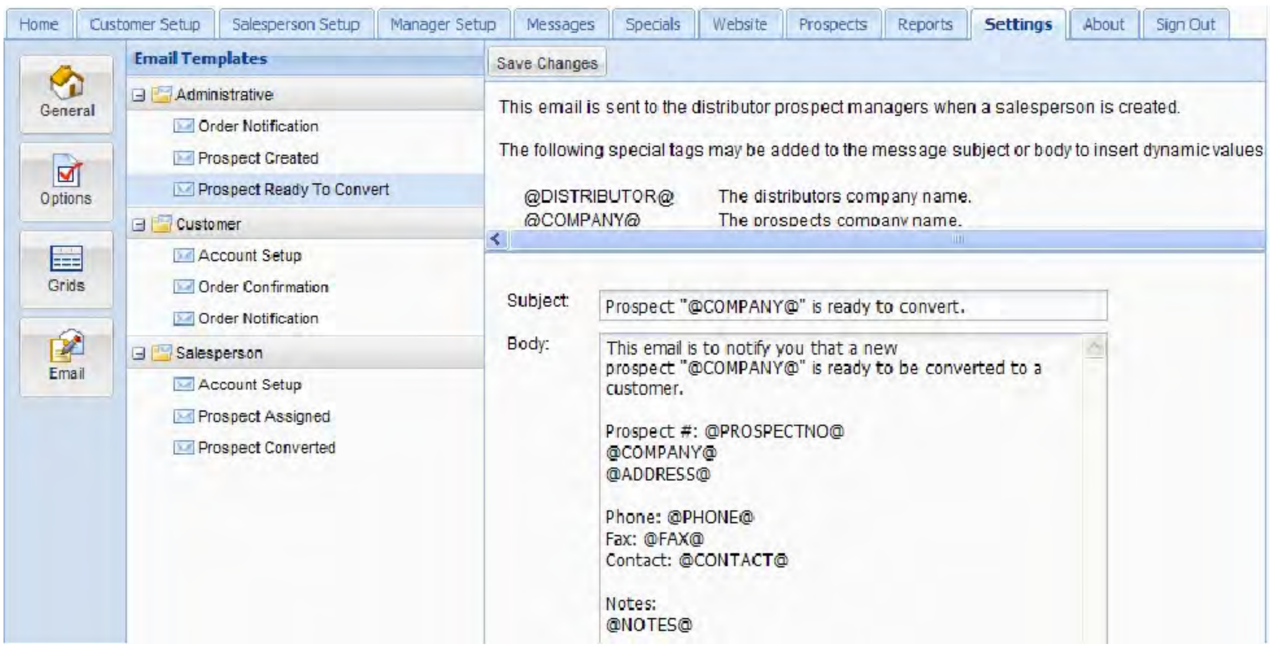
Prospects Feature & Email Templates

The purpose of the “Prospects” feature is to provide the distributor with a set of tools which can be used by the distributor and your salespeople to manage and prepare quotes for potential customers.

The **Prospects** tab is where you will create and maintain your prospects information, guides and eventually convert your prospects to regular customer accounts. Please review the **Prospects Tab** chapter of this guide for more detailed information about this feature.

New **Email Templates** supporting Prospects have been created for companies that choose to implement the Prospects feature.

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



- The **Email Templates** screen will update once the Prospects feature has been implemented. The main menu tabs have been updated to include the new Prospects, Reports and Manager Setup tabs as shown in the image above.

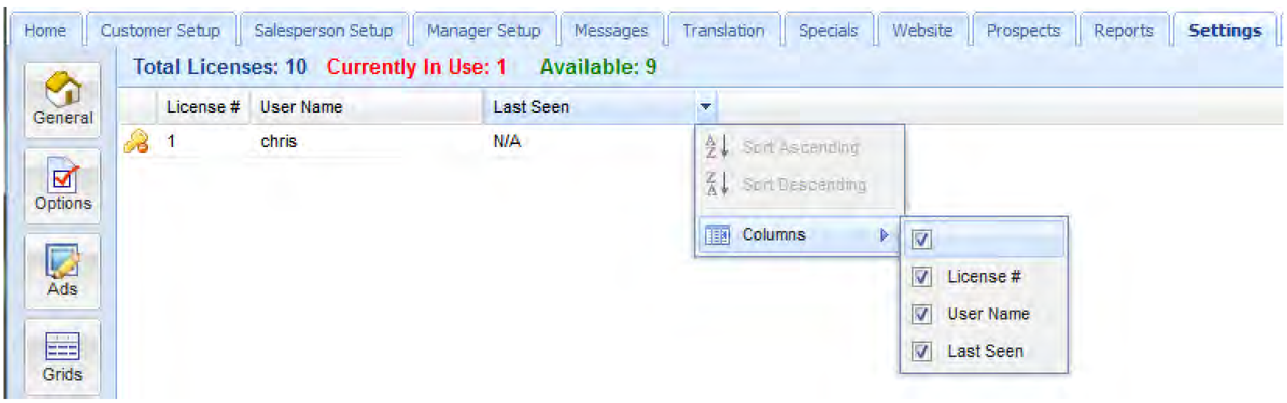
5.5 EOP

EOP Settings

The **Electronic Order Pad** is our first mobile app which interacts with the **entrée.NET** server via wireless connections. The **Electronic Order Pad** (EOP) is an order entry tool for your salespeople that is based off **entrée.NET**. This means the **Electronic Order Pad** communicates directly with a remote **entrée.NET** secure server, and not your local server in your office.

An **EOP** button has been added to the **Settings** tab to allow you to manage your **EOP** licenses and iPad assignments to your salespeople. As your salespeople login to **EOP** on their iPads the **entrée.NET** system **EOP** feature will be automatically post the license information, User Name and here.

- Use the drop down menu on the Last Seen header to control the visible columns on this screen.
- An **N/A** in the **Last Seen** column indicates that User Name has not been logged into EOP.



- Use the key with the red minus tool on the left to revoke **EOP** licenses by salesperson as required.

Example In this example the **Last Seen** column indicates the time that the User Name logged into the EOP application.

Chapter 6

Website Settings

6 Website Settings

The another task for the System Administrator is to update the **Website** tab. This chapter is written for the distributors who purchased the **Website Only** option featuring a website with just the “Catalog” and “Specials” pages, and the **Website and all entrée.NET features** option.

If you have the **Website Only** option your customers can only view your website and do not have the other functions that **entrée.NET** offers, such as entering orders, but you will still be able to upgrade, at a later date, and have all the features of **entrée.NET**.

At this point in time NECS should have already created your initial website and now you have the ability to make website changes as required for your business. You can change images, update the content on your “Welcome,” “About Us,” “Contact,” and “Directions” pages. You will be able to automatically post your inventory list and specials, from your NECS **entrée** software, directly to your website, as often as you’d like.

Our latest features allow you to control the names of the page links in your website menu and the web page descriptions. You also have the power to customize the keywords list used for search engine optimization for each individual web page in your website.

Note The **Website** tab in **entrée.NET** has been enabled for those distributors who did not purchased the website option for **entrée.NET**. This access will provide all distributors with the ability to utilize the "**Featured Brands**" feature for marketing. All the other website options will still be disabled if you have not purchased the website option.

If you would like to designate a **Website Manager** to assist in updating the **entrée.NET** website for your company proceed to the **Manager Setup Tab** chapter for the details.

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

Content Overview

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

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

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

- **Blog** – allows distributors to post multiple articles or news posts on their website. This feature must be activated in the **Settings** tab by selecting "**Yes**" for the "**Display Website Blog**" option.

- **Featured Vendors** – Posted on your website home page this block allows you to highlight multiple vendors and their products.

- **Latest News** – This block is posted on all of your website’s pages in the lower right corner.

- **Featured Item** – Posted on your website home page this block allows you to highlight specials as “featured items”.

The Menu section of your website currently includes:

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

The Pages section of your website can include:

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

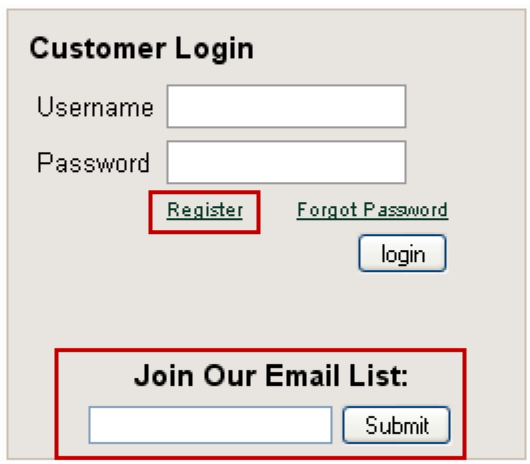
Note The **Place Order** page is not included in the website for distributors who purchased the **website only** option.

Website Examples

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

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

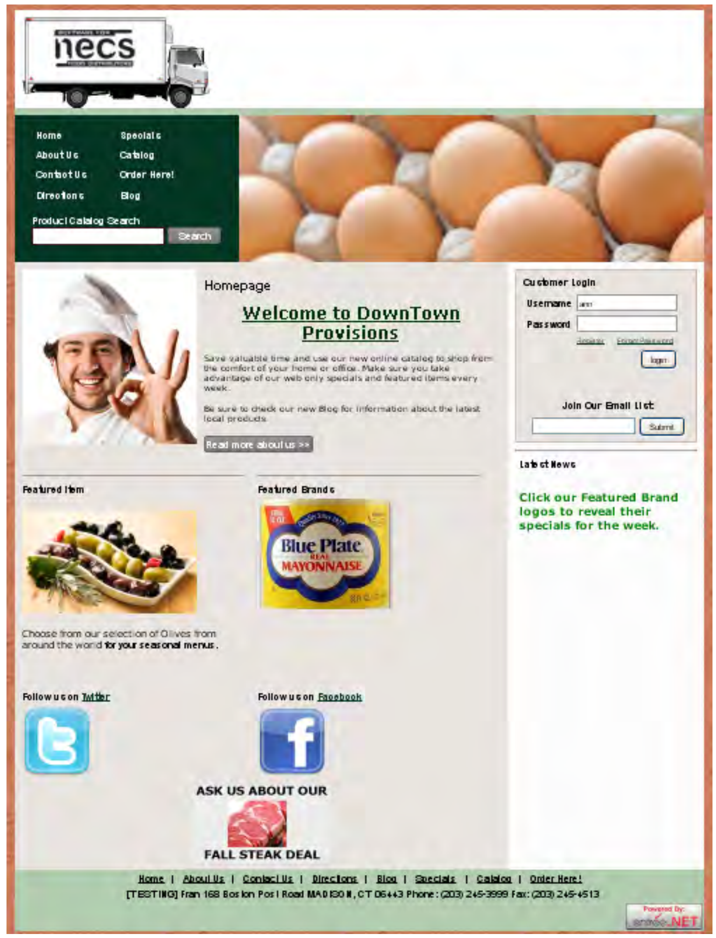
See the **Website Email List** topic to find out how to set up the connection between your website and a third party mailing list provider like Constant Contact.



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

This is a website Home page displaying the latest entrée.NET features

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

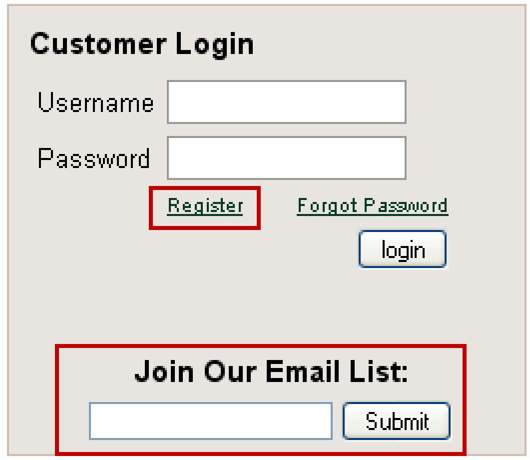


- Banner **Ads Feature** with links to Specials web page, Item Tags, Brand or Class. This content can be positioned at the top or bottom of the website Home page. In this example the Ad is the image of steak with the "Ask us about our Fall Steak Deal" text at the bottom of the page. See the **Settings Tab** for feature controls.

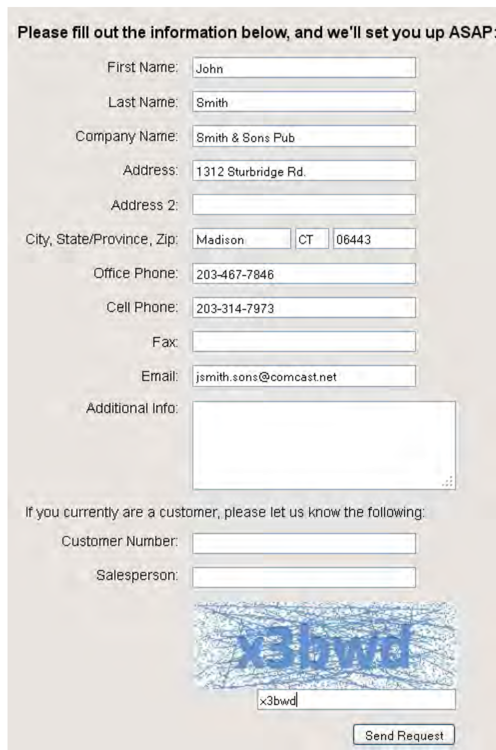
How Website Registration Requests Work

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

Note This feature does not automatically create a user account for the customer to login. You must manually approve and setup any new customer accounts.

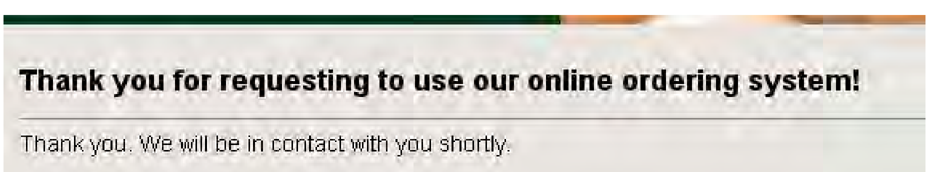


- When the customer clicks the **Register** button they will have an online form to fill out (right).

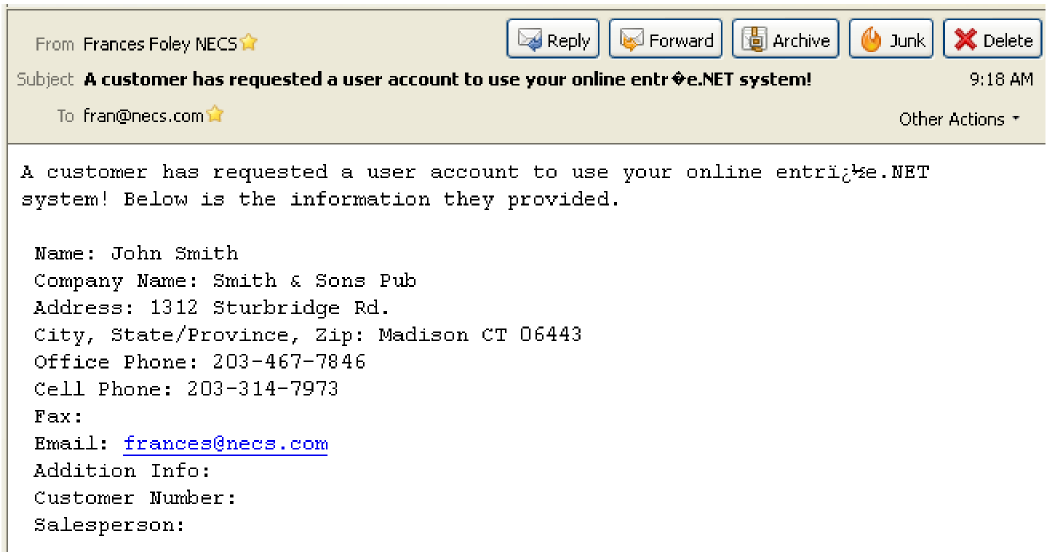


- Once the customer fills in the form, enters the security code displayed and clicks the **Send Request** button the information collected from the registration form is sent to you via an email.

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



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



From Frances Foley NECS
Reply | Forward | Archive | Junk | Delete
Subject **A customer has requested a user account to use your online entr�e.NET system!** 9:18 AM
To fran@necs.com
Other Actions

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

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

Example **More entrée.NET Website Pages**

Blog | About Us | Contact | Directions | Catalog with images

6.1 Updating Web Page Contents

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

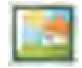
1. Click the **Website** tab, and then click the **Content** button. 

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

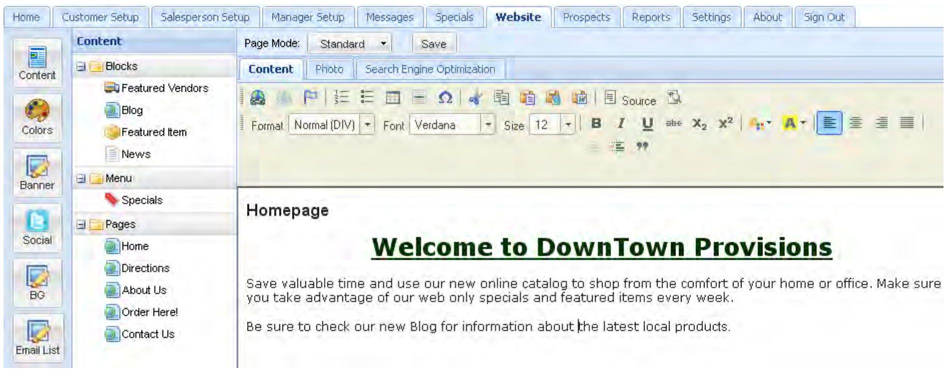
3. The information currently on the page will display when you click the **Content tab**.

4. Your web page content will initially display with in a **Page Mode** of **Standard**. You can choose to edit your web page content using **Advanced Page Mode** by selecting it from the **Page Mode** drop down list. Both **Page Modes** provide you with the same editing tools and the **Search Engine Optimization** tab.

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

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

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



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

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

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

Hot Tip! Website Design Tips:

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

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

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

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

Page Mode Editing Tools

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

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

- **Font** – Use the drop down menu to make a selection from a short list of the fonts best suited for web pages.
- **Size** – Font size drop down menu.
- **Bold** – Make the selected text **bold.**
- **Italic** – Make the selected test *italic*.
- **Underline** – Underline the selected text.
- **Strike Through** – Inserts a ~~strikethrough~~ line into the selected text.
- **Subscript** – Places the index at the bottom of the text like the “2” in B_{2}.
- **Superscript** – Places the index at the top of the text like the “th” in 4^{th}.
- **Text Color** – Change the color of the selected text.
- **Text Highlight Color** – Change the background color behind the selected text.
- **Left Justify** – Align the selected text to the left.
- **Center Justify** – Center the selected text.
- **Right Justify** – Align the selected text to the right.
- **Block Justify** – Each line of text will have the same length.
- **Decrease Indent** – Moves the selected text left.
- **Increase Indent** – Moves the selected text right.
- **Block Quote** – Use block quotes whenever a quote exceeds four lines of text. This can be use to add direct quotes from your customers into your web page text.

- **Link** – Make the selected text a hyperlink.
- **Unlink** – Remove the hyperlink from the selected text.
- **Anchor** – Create a link to an anchor in the text of your web page. This is used to move web page visitors directly to a selected topic in a web page. The topic anchors are usually listed at the top of the web page and link to the topic farther down the web page.
- **Image** – Insert an image.
- **Numbered List** – Start a numbered list.
- **Bullet list** – Start a bullet list.

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

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

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

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

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

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

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

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

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

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

Spotlight on Web Design Tools

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

The Table Properties tool is used to insert a table into your web page.

Tables can be used to organize lists of products or create columns for text and images in your web page. Follow these steps to use this tool:

1. Move the cursor to the desired table location in the web page.

2. Click the **Table** icon.  The Table Properties pop up box will display.

3. Enter the number of **Rows** and **Columns** in your table.

4. Enter a number for the **Width** of the table. Select either **pixels** or **percent** of the web page from the drop down list. For example; you can enter 50 for Width and select percent and your table will be one half the web page's total width in the browser.

5. Enter the number of pixels for the **Height** of the table.

6. **Headers –** Are used to add titles on your rows and columns. Select from none, First Row, First Column or Both. Then type the title in the header area of the table.

7. **Cell Spacing –** Enter the number of pixels for the space between table cells.

8. **Cell Padding -** Enter the number of pixels for the space between the contents of the cell and the cell wall.

9. **Border size –** Enter a number here for the width in pixels of the table border. Enter a zero if you want no visible border line on the table.

10. **Alignment –** Select from Left, Center or Right for the alignment of the text in the table.

11. **Caption –** Enter the caption you would like to appear above the table.

12. **Summary –** Enter a summary of the information in the table.

13. Click **OK.**

Example

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

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

The Caption is displayed above the table.

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

Directions for training session on May 28th 2010.

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

Edit an Existing Table:

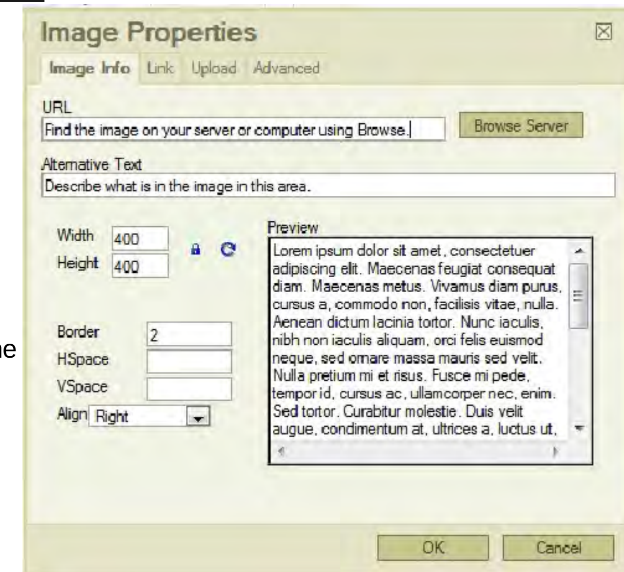
You can view and change its properties by right-clicking the table with your mouse. Select **Table Properties** from the list. When the **Table Properties** pop up box displays make your modifications and click **OK**.

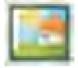
Delete a Table:

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

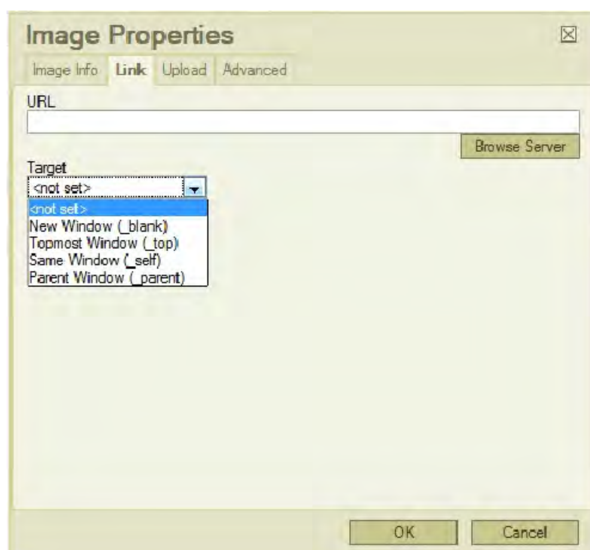
Note Not all of the options are required to build a table. You have to fill only rows and columns. The remaining fields are optional and you may use them depending on your needs.

How to insert an image using the Image Tool:



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

How to use an image as a link:



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

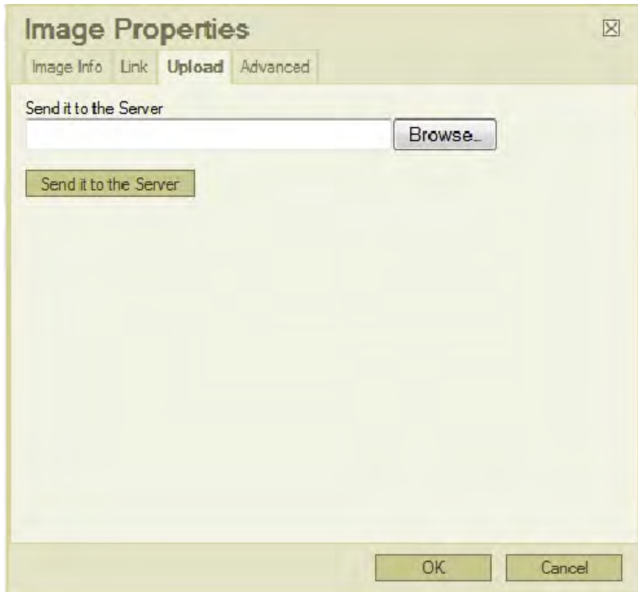
How to upload an image to your server:

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

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

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

4. Click **OK.**



How to insert special characters:

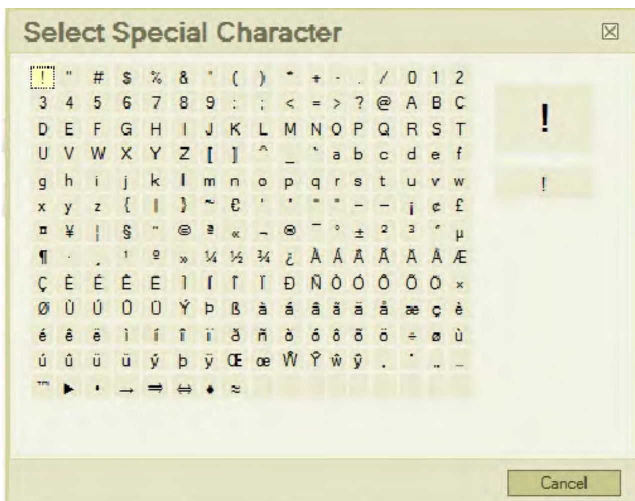
The Select Special Characters tool is used to insert characters into your web page text that are not available on your computer keyboard. Follow these steps to use this tool:

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

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

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

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

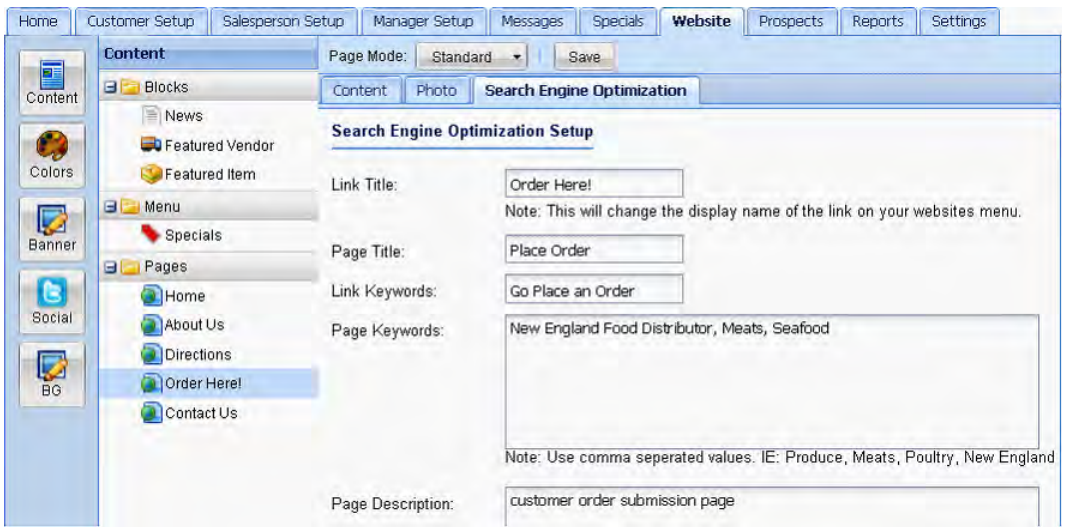


6.2 Search Engine Optimization

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

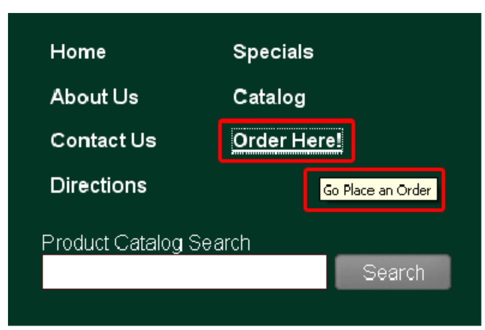
- **Link Title**: The title the link for that page will display in the website menu. If the current **Link Title** is OK, then you can bypass this value.
- **Page Title**: The title of the web page that will display when viewed in a customer's browser.
- **Link Keywords**: The text that will display when the mouse rolls over the **Link Title** in the menu.
- **Page Keywords**: This is the keyword list search engines will use in reference to your web page. These keywords help to determine how quickly your web page is found.
- **Page Description**: A description of the purpose of the web page and what it offers to the customer.

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



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

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



6.3 Adding Photos to Web Pages

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

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

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

3. Click the **Photo** tab.

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

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

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

7. Click the **Browse** 

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

8. Locate the desired image file on your computer, click on the image file to select it.

9. Click the **Open** 

 button.

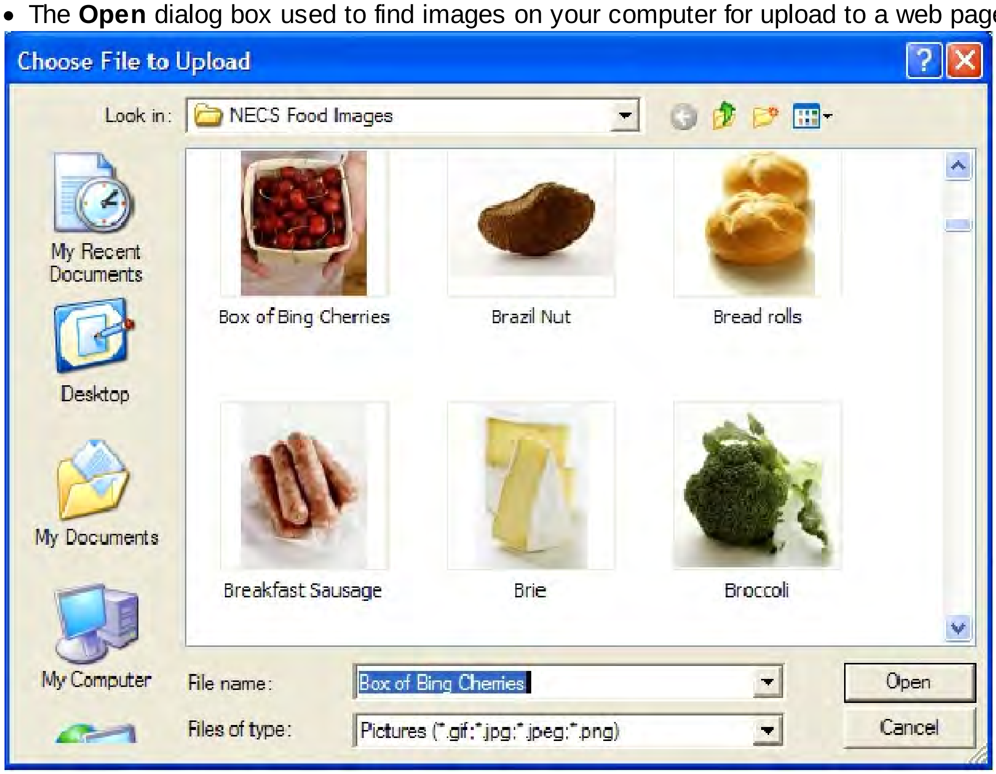
10. Click the **Upload** 

 button.

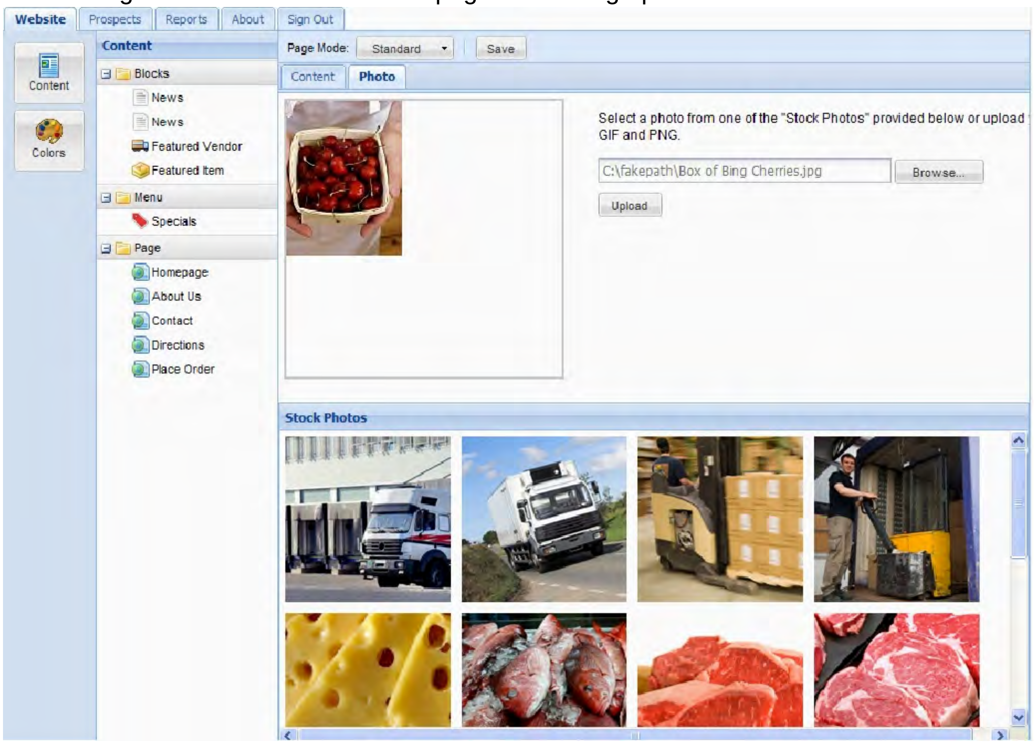
11. The image file will now be uploaded and display in the image area.

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

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



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



- The **Home** page of the website with the new photo.

6.4 Updating Blocks Content

The website blocks that are covered in this section of the chapter are: **Blog**, **News**, **Featured Brands** and **Featured Item**.

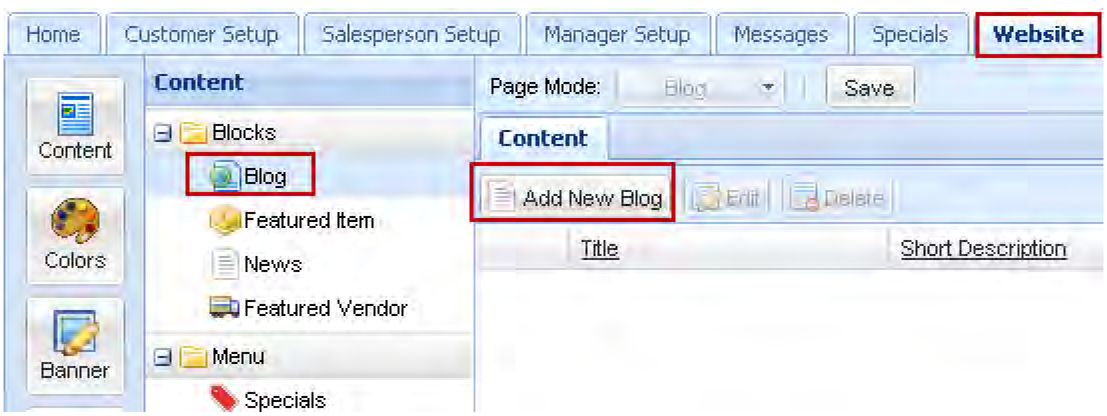
The Blog Block

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

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

Adding Content to your Blog:

1. Click the **Website** tab.
2. In the **Content** menu under the **Blocks** section click **Blog**.
3. Click the **Add New Blog** button.



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

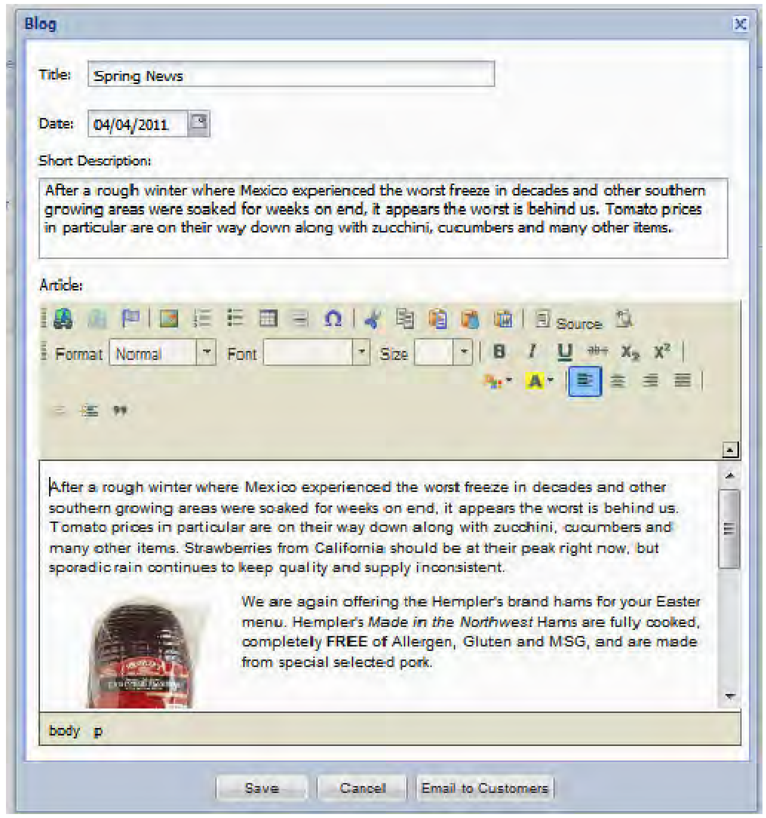
5. Enter a **Title** for the blog entry. This title will be displayed in the Blog page of the website.

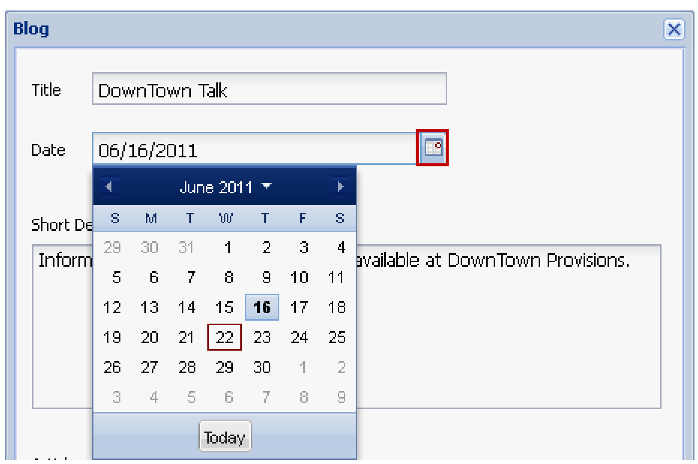
6. Enter a **Date** for the blog entry. You can either click the calendar icon (as seen in the image below) to select a date or type a date in the text box.

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

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

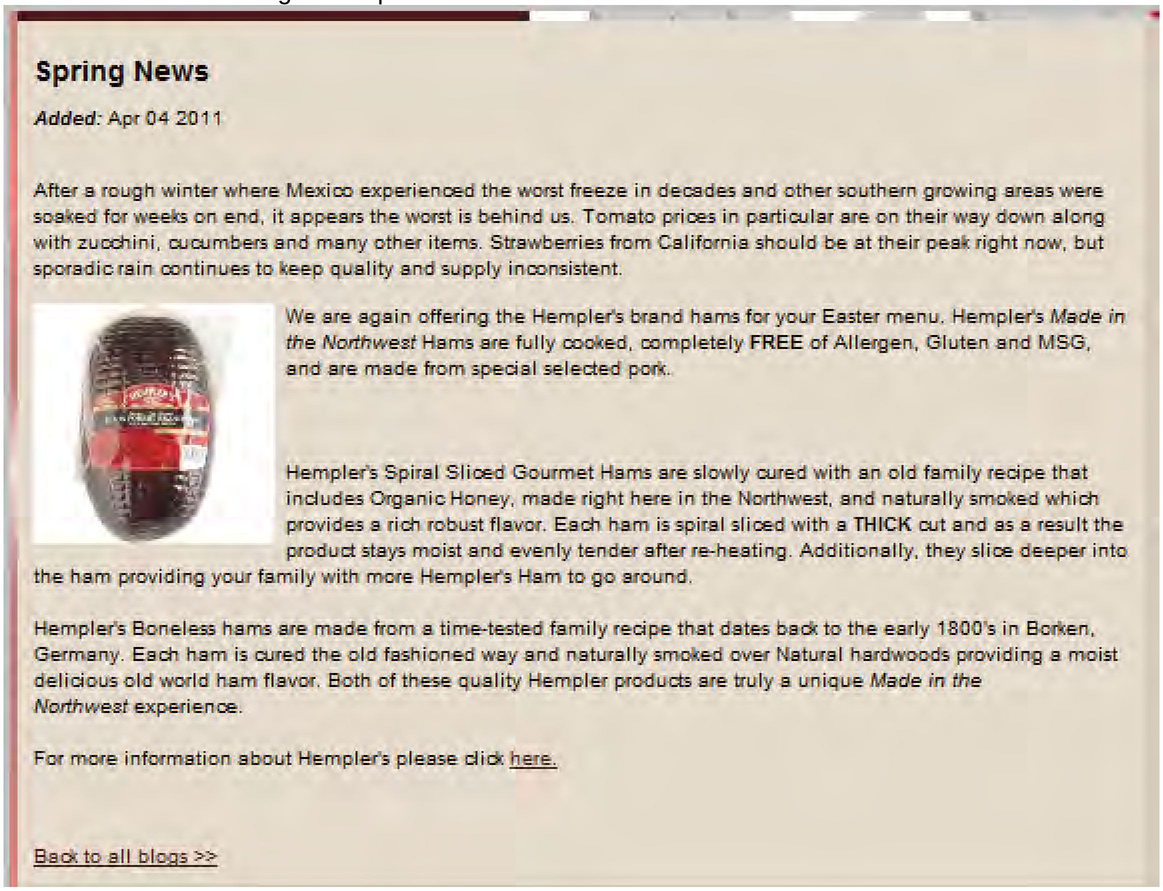
9. The **Article** section is where you will enter the complete blog entry. You can include whatever information you would like to share with your customers.





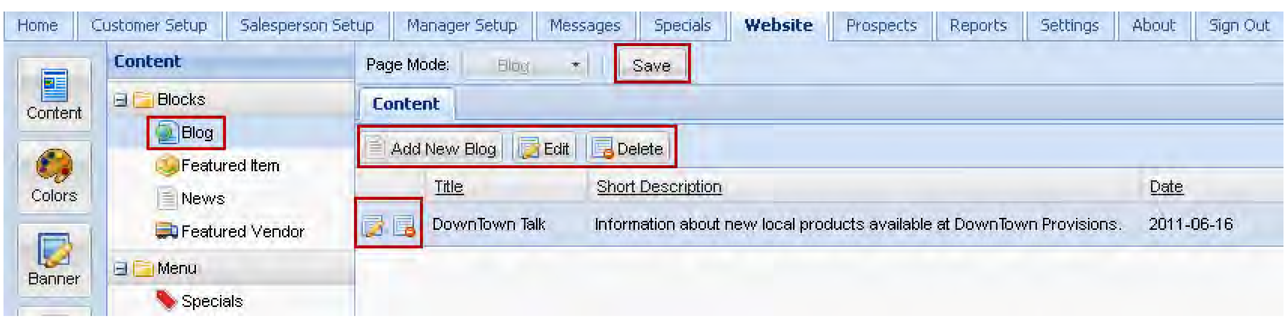
10. When you have finished editing your blog entry click the **Save** button. Now it will be added to the **Blog** page of your website.

Example A Blog article posted in the website.



Managing your Blog Entries

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



Email Blog Entry to All Customers

1. Click the **Website** tab.
2. In the **Content** menu under the **Blocks** section click **Blog**.
3. Select the desired blog entry and click the **Edit** button.
4. When the Blog edit dialog box opens click the "**Email to Customers**" button at the bottom of the window.
5. The **Email Blog to Customers** dialog box will display. The default Recipient value is **All Customers**.

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

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

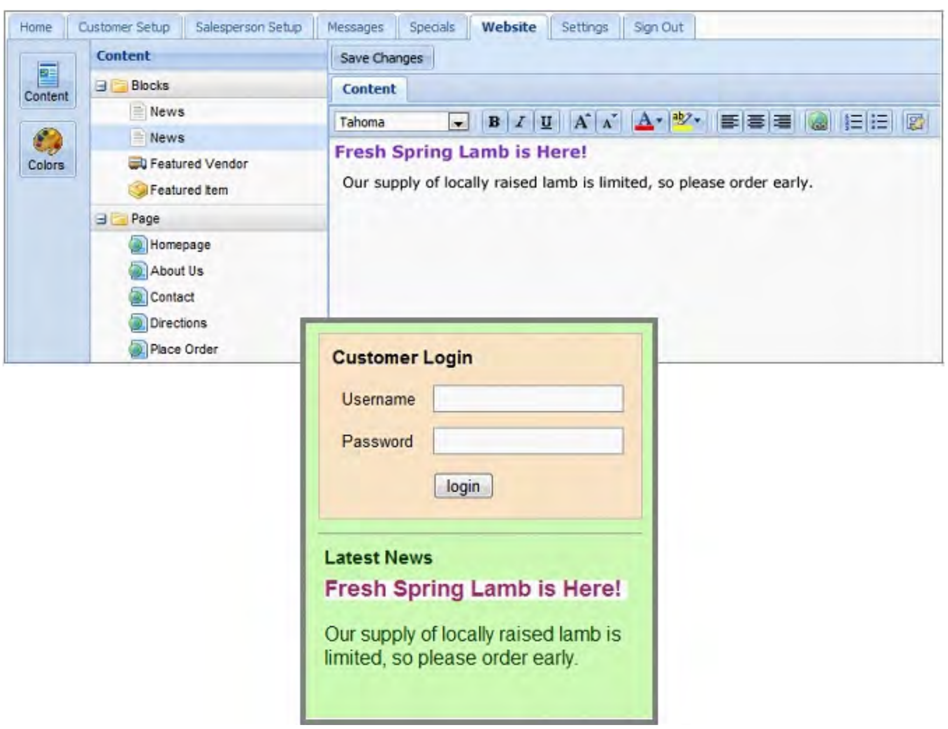
The News Block

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

1. Click the **Website** tab
2. Click on the **News** block in the Content list on the left.
3. The information currently in the block will display under the **Content** tab.
4. Add your new information and remove any obsolete information.
5. Use the tools discussed previously in this chapter to change the text color, font, highlight text, change text size or whatever you wish.
6. When your changes are complete, click the **Save** button to save your changes and update the **Latest News** your website.

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

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

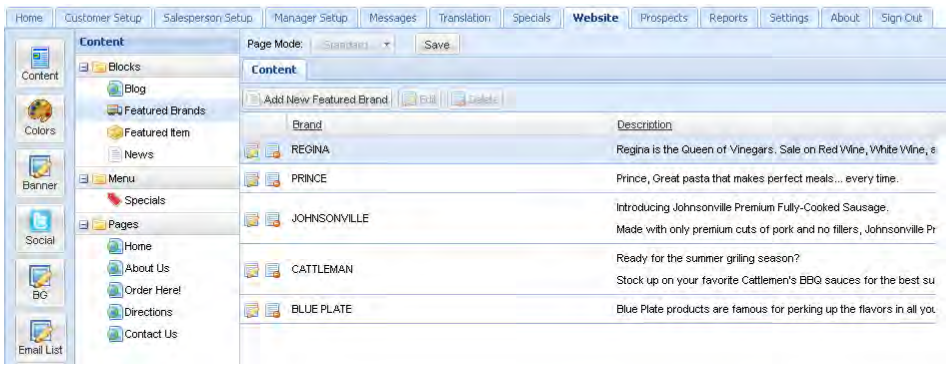


Updating Featured Brands

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

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

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



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

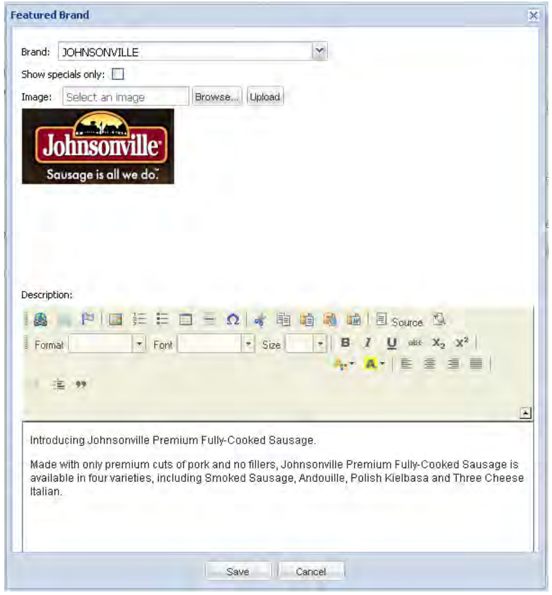
1. Click the **Website** tab. In the **Content** list click on **Featured Brands**.

2. The **Featured Brands** screen will display all the brands currently in the block. Use the **Edit** and **Delete** buttons to manage your brands.

3. Click the **Add New Featured Brand** button to open the **Featured Brands** dialog box.

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

5. Enter Brand information and use the following options:



- **Show specials only –** Check this option to only display the brand's specials when the brand image is clicked on the Home page. If not checked all the brand's products in your catalog will be listed.
- **Image:**
  - Use **Browse** to select an image file on your computer and **Upload** a brand image that will be displayed in the Home page slide show and used as the link.
  - **Upload –** To upload an image follow steps 15 – 22 in Updating the Featured Item Block section on the last page of this chapter.
- **Description:** Enter product or specials information. This text will be used for **Website SEO** and will **not** be displayed.

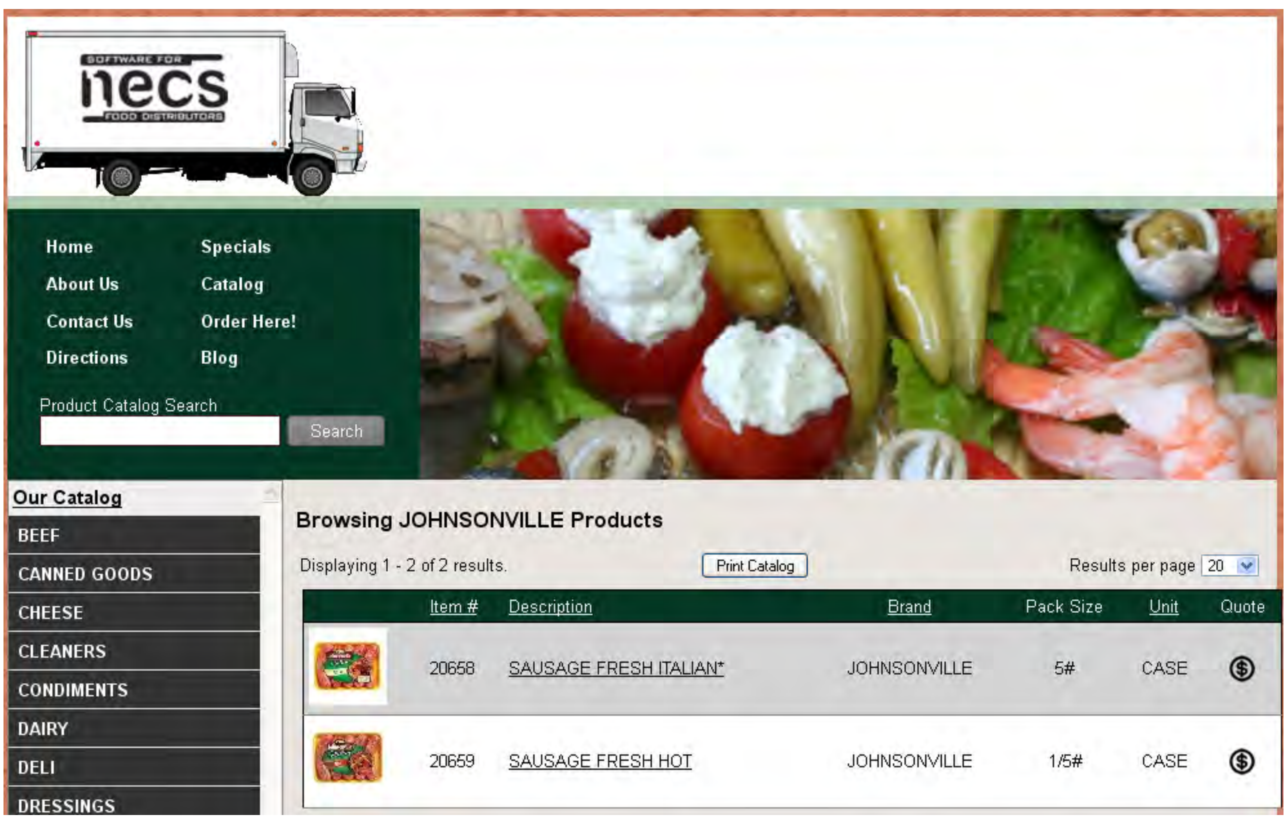
6. Click the **Save** button and your website **Featured Brands** block will be updated.

Example These are examples of the Featured Brands block as the slides change to show different brands.

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

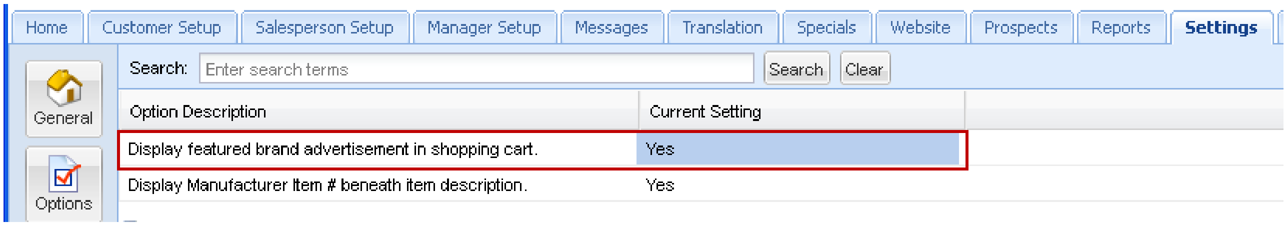
- When the customer clicks the **Shop Now** link in the shopping cart area they will be brought to the **Catalog** with a list of all the products for that brand.

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



Displaying Featured Brands in the Shopping Cart

In the **Settings** tab **Options** section you have the option to showcase your **Featured Brands** in the shopping cart area using the "**Display featured brand advertisements in shopping cart**" option.



- When this option is set to "**Yes**" the information you define in the **Featured Brands** section of the **Website** tab will be displayed in the bottom of the shopping cart.
- When the customer clicks the **Shop Now** link in the shopping cart area they will be brought to the **Catalog** with a list of all the products for that brand.
- When your customer mouses over the **Featured Brands** area the slide controls (outlined in red below) will display so they can view all your Featured Brands at their own pace.

Updating the Featured Item Block

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

1. Click the **Website** tab.

2. Click on the **Featured Item** block in the Content list on the left.

3. The featured item dialog will display with the information currently in the block.

4. Click the **Clear** button to remove the current **Featured Item** content.

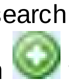
5. Click to check the **Show featured item** box to display it on the **Home** page of your website.

6. Click **Select an item to feature.**

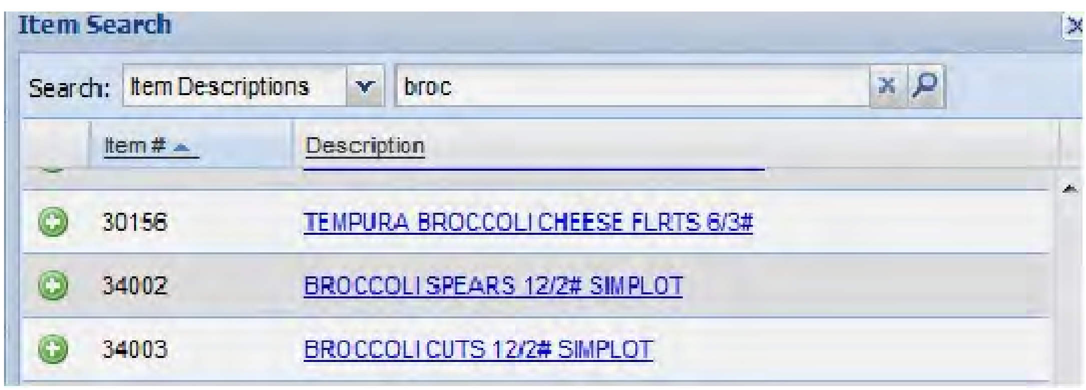
7. The **Item Search** dialog box displays. In the **Search** drop down list select a search option: **Item Descriptions**, **Class** and **Item Number**.

8. Enter text in the box and click to search. 

9. The **Item Search** box displays the search results.

10. Find the item and click the Plus icon  to select it.

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

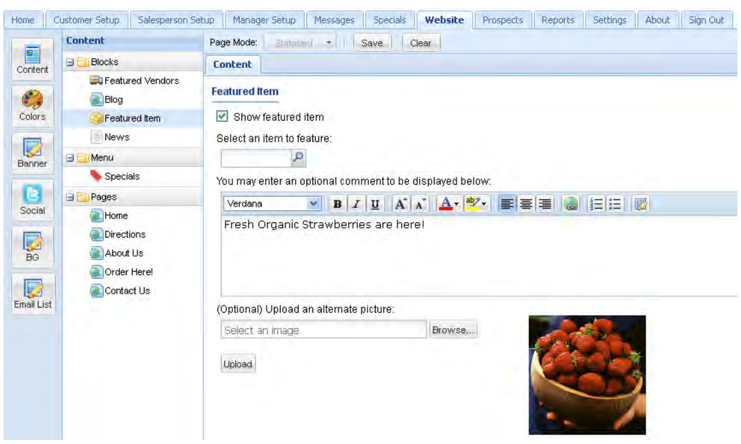


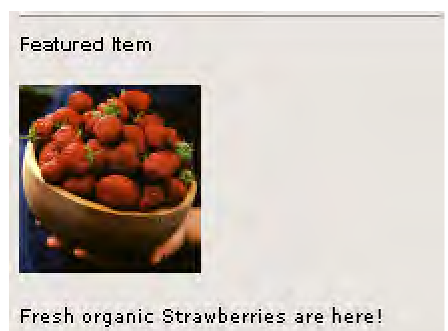
12. The **item #** will now display in the **Select an item to feature** box.

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

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

15. You have the option to upload an image or alternate image for the item. The supported image formats are JPG, JPEG, GIF and PNG.
16. To upload an image for the item: Click the **Browse**  button.
17. The **Open** dialog box will display.
18. Locate the desired image file on your computer. Click on the image file to select it.
19. Click the **Open**  button.
20. Click the **Upload**  button.
21. The image file will now be uploaded and display in the image area.
22. Click the **Save** button and your website will be updated.





The **Featured Item** block as seen on the **Home** page of the website.

6.5 Updating Website Colors

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

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

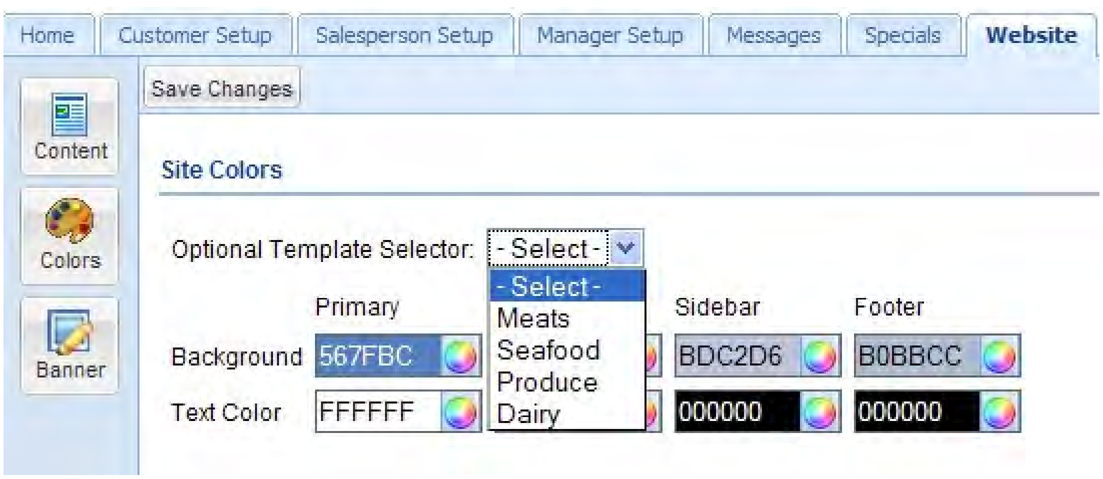
2. Use the **Site Colors** section to select colors from the drop down palettes or if you have specific colors that your company uses, your can enter the RGB values for the colors in the box. The RGB values are displayed in the color box after you select a color from the palette.

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

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

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

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



6.6 Website Specials

Specials Setup

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

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

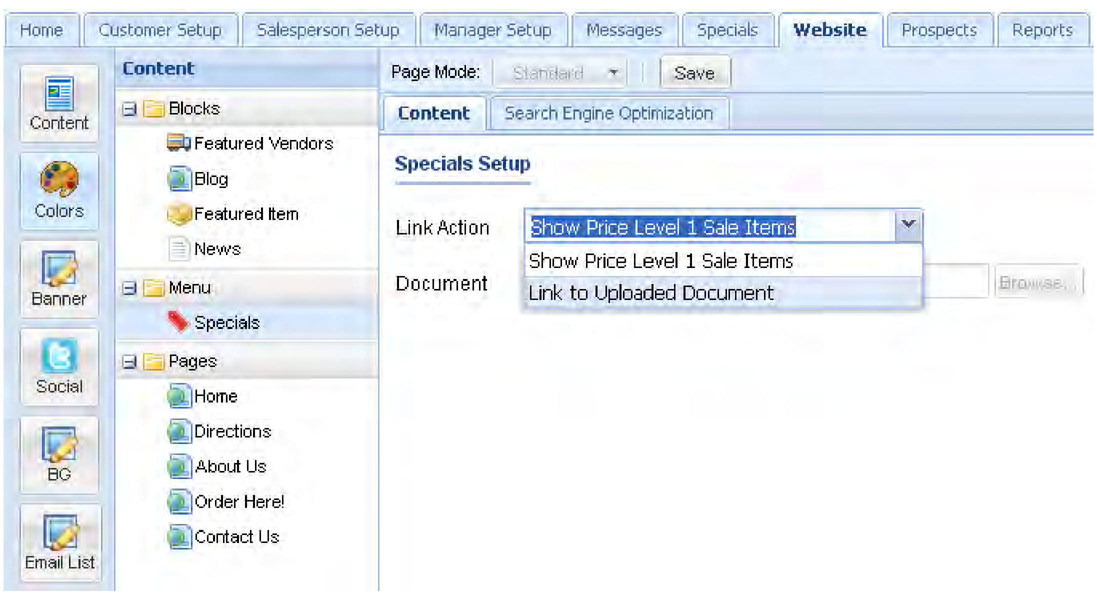
- **Link to Uploaded Document –** This option allows you to select a file from your computer to upload for the **Specials** link content.

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

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

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

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



Specials Link Setup Process

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

2. Click on **Specials** in the **Menu** folder of the Content list on the left.

3. The document currently uploaded to the **Specials** link is shown in gray text in the **Document** file name selection box.

4. To add new information to the **Specials** link select a **Link Action** from the drop down list. Your options are **Show Price Level 1 Sale Items** or **Link to Uploaded Document.**

5. If you select **Show Price Level 1 Sale Items** go to step 7 to save.

6. If you select **Link to Uploaded Document**

    a. Click the **Browse** 

button.

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

.

    c. Click the **Upload** 

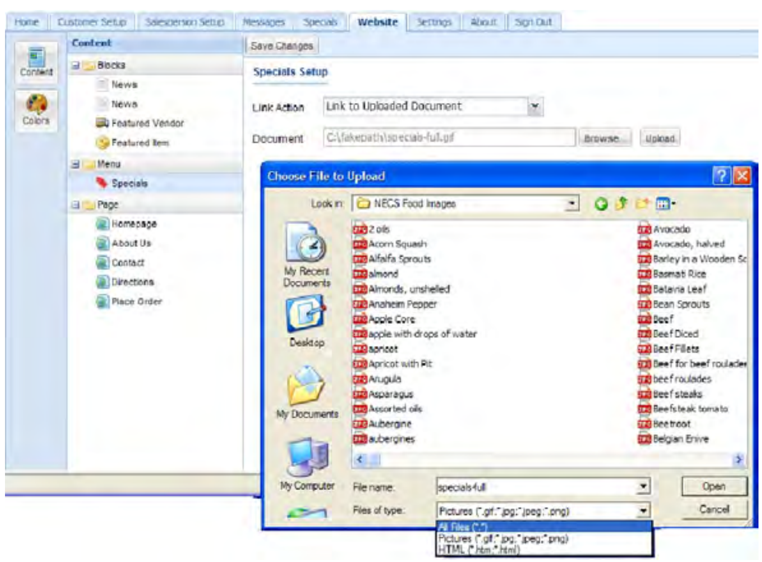
button.

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

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

Back: The **Website** tab **Specials Setup** screen **Link to Upload Document** selected.

Front: When you click the **Browse** button the **Choose File to Upload** pop up box displays. Find and select your file and click **Open.**



6.7 Website Banner Editor

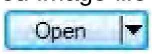

The new "Banner" editor allows distributors to upload up to six images of their own to be used in the scrolling image banner on the website. Be sure to clear the cache of your internet browser to see the new banner images in your website instructions follow this section.

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

2. Select a Slide Image you want to replace with an uploaded image from your computer, the supported image formats are JPG, JPEG, GIF and PNG.

3. Click the **Browse**  button and then the **Open** dialog box will display.

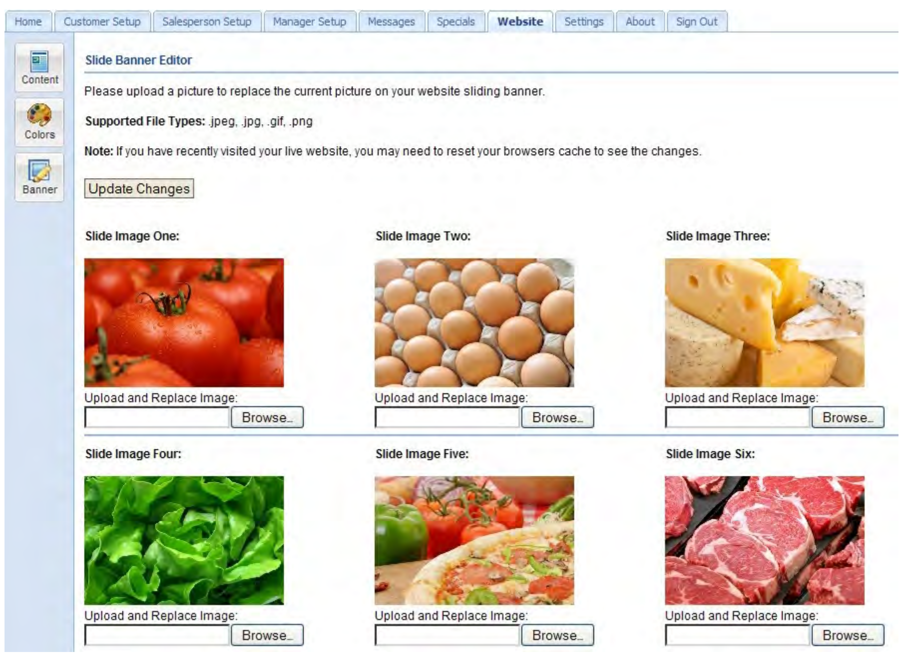
4. Locate the desired image file on your computer, click on the image file to select it.

5. Click the **Open**  button.

6. Click the **Update Changes** button.

7. The image file will now be uploaded and display in the selected slide image area.

8. Repeat the process for all the slides where you want to replace the stock images.



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

Clearing the Browser Cache after Website Banner Updates

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

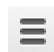
- If your internet browser is **Internet Explorer**:

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

- If your internet browser is **Mozilla Firefox**:

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

- If your browser is **Google Chrome**:

  a. Click the customize button .
  b. In the menu select **Tools**.
  c. In the next menu select **Clear browsing data...**

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

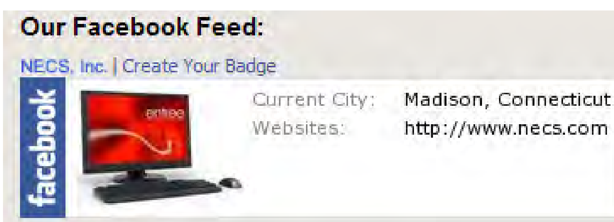
* Google Chrome is a trademark of Google Inc.
* Internet Explorer are either registered trademarks or trademarks of the Microsoft Corporation in the United States and/or other countries.
* Mozilla Firefox is a registered trademark of Mozilla Foundation.

6.8 Social Networking

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

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

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



What is a Username?

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

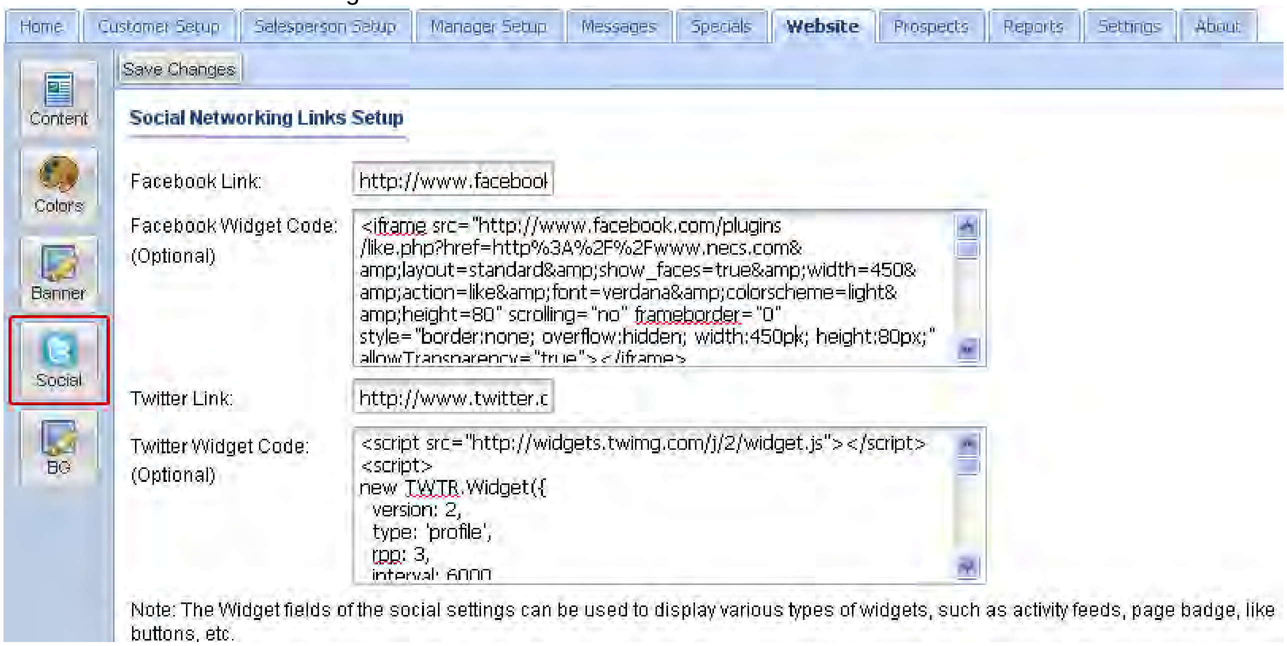
You can customize your Facebook and Twitter accounts by selecting unique usernames for your business when you first create your account. In Facebook your username will appear in the location bar of your browser after "http://www.facebook.com/" in the Profile page. In Twitter your username is the text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

To access entrée.NET social networking features

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

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

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



Adding a Facebook Link to your entrée.NET website

1. Login to your Facebook account.

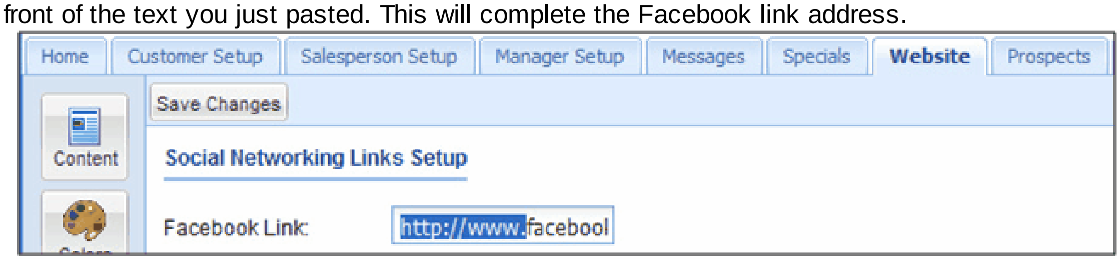
2. Click the **Profile** button in the top toll bar.

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

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

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

6. Now edit the link information in the text box. Click in the beginning of the text box and add **"http://www."** in front of the text you just pasted. This will complete the Facebook link address.



7. When complete it should look like this: **http://www.facebook.com/username** where **username** is the username on your Facebook account.

8. Click the **Save Changes** button when done.

Adding a Twitter Link to your entrée.NET website

1. Login to your Twitter account.

2. Your Twitter Link code is "http://www.twitter.com/username" where "**username"** is the username on your Twitter account.

3. Copy the link above and substitute your Twitter username in the text. Then paste the corrected text in the **Twitter Link** field in the **Social Networking Links Setup** section.

4. Click the **Save Changes** button when done.

6.8.1 Social Networking Feeds

Once you have created an account in Facebook or Twitter you can use their plugins for your **entrée.NET** website home page. You can add as many links as you would like on your website home page in the Social Networking Links Setup section of the **Social** button feature in the Website tab of **entrée.NET**.

- **Options available for the Facebook Widget Code field in entrée.NET**

1. If you already have an RSS feed on your company website copy this code and paste it into the **Facebook Widget Code** text box.

2. **Activity Feed Plugin:** The Activity Feed plugin displays the most interesting recent activity taking place on your site.

Link to the Activity Feed Plugin: http://developers.facebook.com/docs/reference/plugins/activity/

3. **Like Button:** The Like button lets a user share your content with friends on Facebook. When the user clicks the Like button on your site, a story appears in the user's friends' News Feed with a link back to your website.

Link to Like Plugins: http://developers.facebook.com/docs/reference/plugins/like/

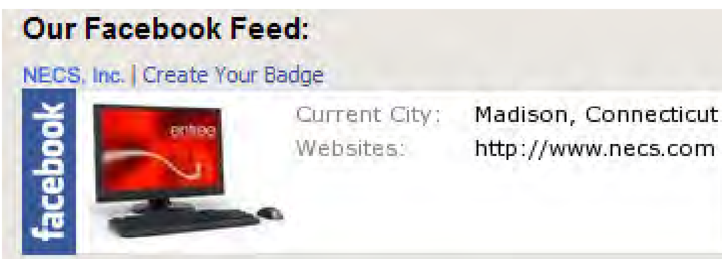
4. **Badges**: The "Find Us on Facebook" badge provides your business a way to promote your Page off of our website, and help direct your customers to your presence on Facebook.

How to access Profile Badges

a. Login to your Facebook account.

b. Click the **Profile** button in the top menu bar.

c. In the column on the left at the bottom click the **Add a Badge to Your Site** link.



5. **Facepile**: The Facepile plugin displays the Facebook profile pictures of users who have liked your page or have signed up for your site.

   Link to the Facepile Plugin: http://developers.facebook.com/docs/reference/plugins/facepile/

Adding your Facebook Widget Code to entrée.NET

1. Login to your Facebook account.

2. Once you have decided which feed to use in Facebook. Use their plugin to generate the source code for your feed.

3. Copy the source code from Facebook and paste it into the **Facebook Widget Code** text box.

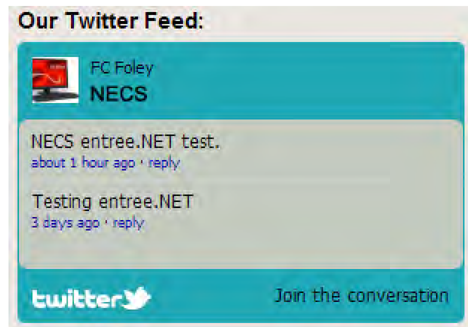
4. Click the **Save Changes** button when done.

Adding your Twitter Widget Code to entrée.NET

1. Login to your Twitter account.

2. To view “FOLLOW US” on Twitter buttons click the **Resources** link at the bottom of the Twitter page.

3. Click the “**See all Follow buttons**” link.



4. At the bottom of the page click the “Follow me on Twitter” or the “Follow us on Twitter” link to change the button text you want displayed. Click a button to select the one you want to use in your **entrée.NET** website.

5. Click the button and the source code text box will pop up.

- **Here is a sample of the source code:**

6. Copy the source code from Twitter and paste it into the **Twitter Widget Code** text box.

7. Click the **Save Changes** button when done.

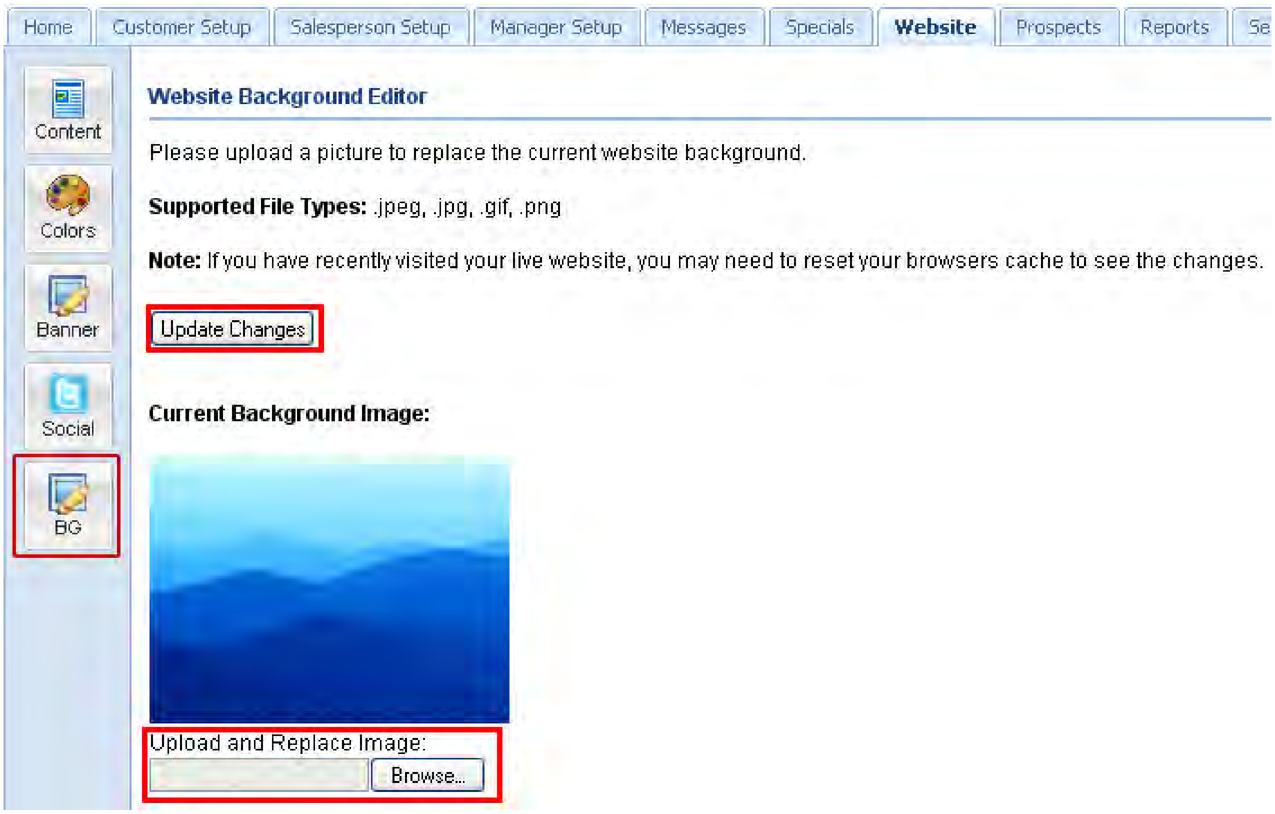
6.9 Website Backgrounds

The "Website" tab background feature gives you the ability to change your **entrée.NET** website background image. The images files types supported in this feature are jpeg, jpg, gif and png.

Access this Backgrounds feature

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

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



How to update your website background

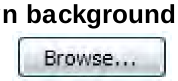
1. Click the "**BG**" button and the **Website Background Editor** screen is displayed. You have two options available to you for selecting background images, our stock images or upload your own images.

2. **For stock background images:**

   a. Click the **Select** button for the desired background image.

   b. Click the **Update Changes** button to save your website background.

3. **To upload your own background images:**

   a. Click the **Browse**  button and the **File Upload** dialog box will display.

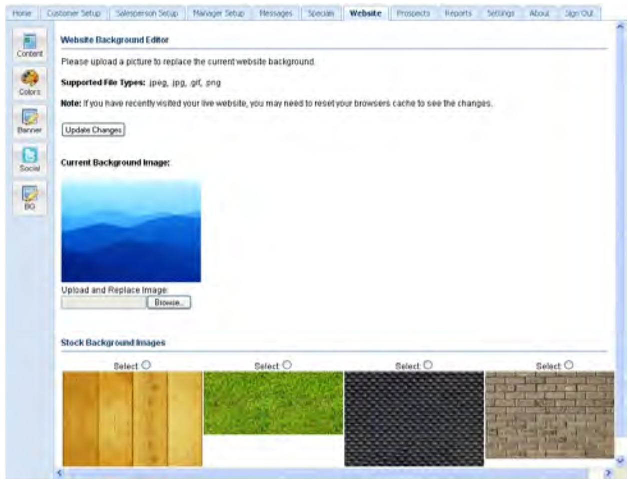
   b. Locate the desired image file on your computer, click on the image file to select it.

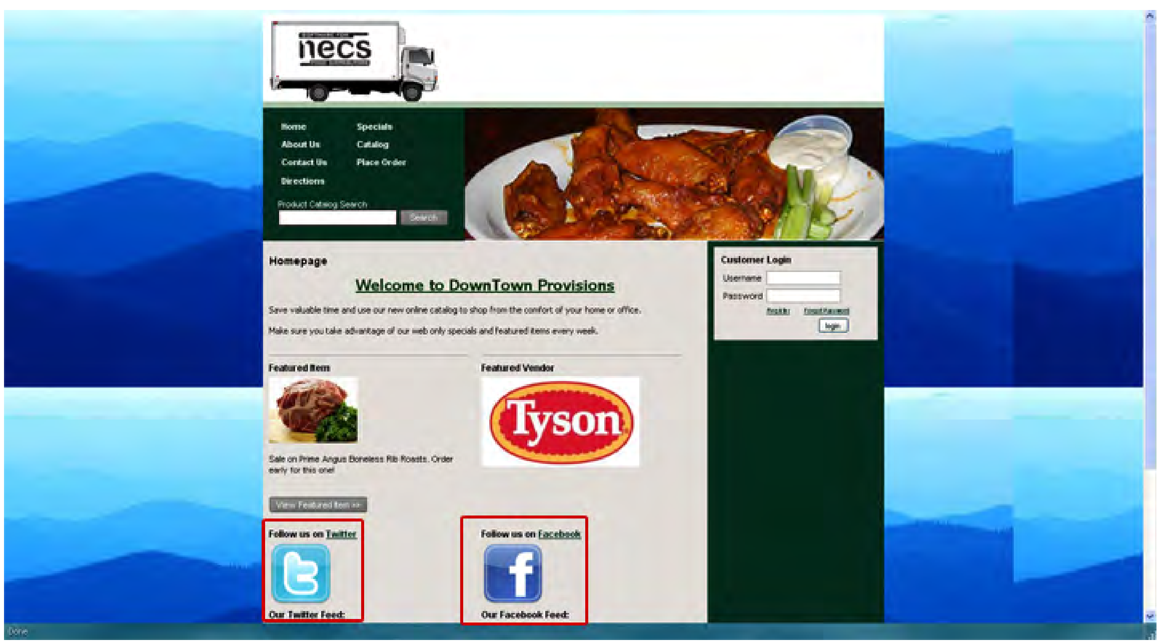
c. Click the **Open** button.

d. The image file will now be uploaded and display in the **Current Background Image** area.

e. Click the **Update Changes** button to save your new website background.

Example Here is a sample of an uploaded image in the BG screen and with the website home page with a new background. Both the stock and uploaded images will be tiled in the website background.





Note Some images you upload may not work well as website backgrounds. After you update your website background from images you upload, you should open your web browser to check your website home page. If it does not look good try another image or use a stock image. Try to keep the images for your background simple and similar to the stock images provided.

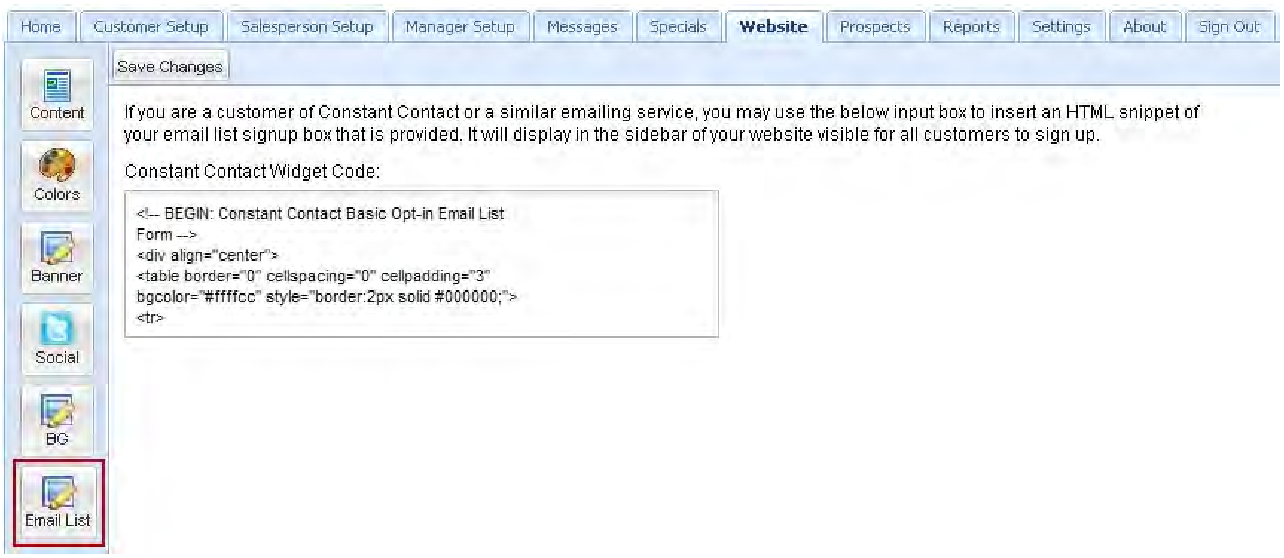
6.10 Website Email List

The "Website" tab Email List feature allows you to add a 3rd party mailing list sign-up widget to the sidebar of your website. Just add the mailing list "widget" code HTML from your 3rd party mailing list provider, such as Constant Contact, to enable the feature.

Access the Email List feature

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

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



3. Sign in to your 3rd party mailing list provider, like Constant Contact. Create and customize a Join My List box. Then copy the "widget" code HTML they provide for your account and save it in a text file on your computer.

4. Paste the "widget" code HTML into the Constant Contact Widget Code box as shown above.

5. Click the **Save Changes** button.

6. The widget from your 3rd party provider will then be displayed in the right hand sidebar of the website Home page.

A sample of HTML code has been included in the image above. Your code will be copied from your account with your mailing list provider and may look different. Please visit **www.constantcomtact.com** for more information about Constant Contact and creating email marketing campaigns.

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

6.11 Contact List

The Contact List feature is used to populate the contact information to be presented on the **Contact Us** page of your website. Enter the information about the people in your business who will be the customer contact points.

- **Tools:**
  - Add New Contact
  - Edit Contact
  - Delete Contact

- Order - Sets the order contacts are displayed in the list. Blank defaults to last.
- Name - Contact's name.
- Title - Contact's job title.
- Phone - Contact's phone number.
- Fax - Contact's fax number.
- Email - Contact's email address.

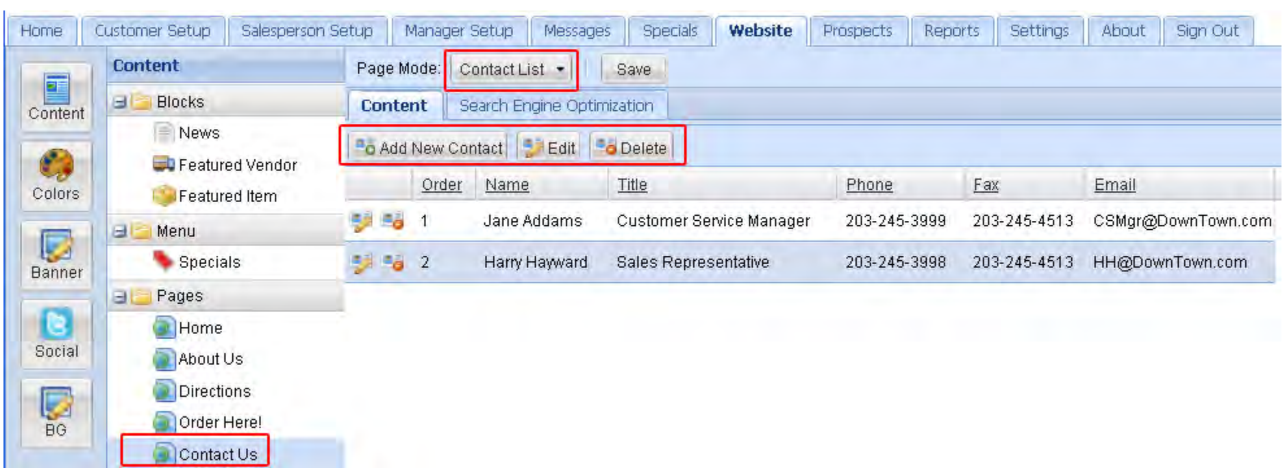
Creating a Contact List

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

2. Click on **Contact Us** in the **Pages** list.

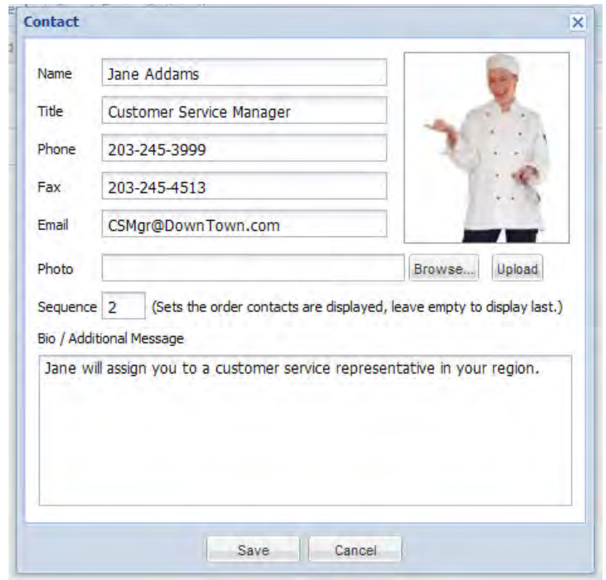
3. In the Page Mode drop down menu select **Contact List**.

4. The **Contact List** page will display with your current contact list information.



5. To add to your contact list click the **Add New Contact** button.

6. The **Contact** dialog box will display.



7. Enter the following information:
   a. Name - contact name.
   b. Title - contact title.
   c. Phone - contact phone number.
   d. Fax - contact fax number.
   e. Email - contact email address.
   f. Add a photo to the contact card if you desire. Click **Browse**, select the file then click **Upload**.
   g. Sequence - an assigned numerical value representing the order of the contact in the list.
   h. Bio / Additional Message - Add any information here to assist with communications with your customers.

8. Once all the information is entered click **Save.**

9. Repeat steps 5 - 8 until all your contacts have been entered into the system.

The **Contact List** information above as it looks in the website **Contact Us** page.

Editing a Contact

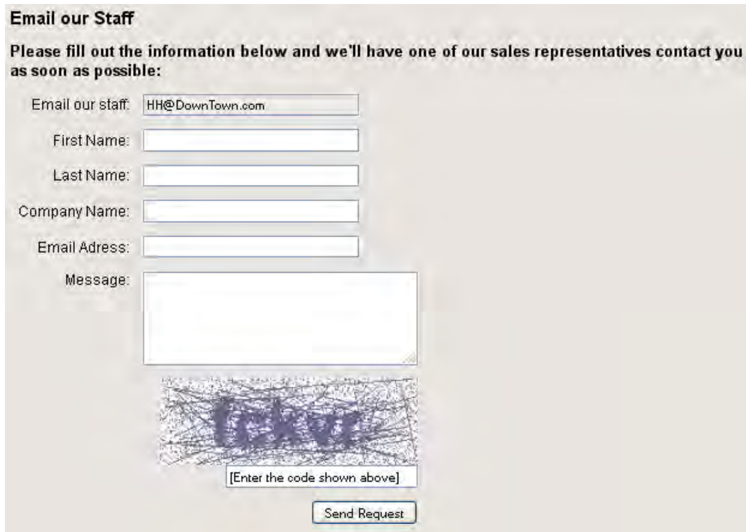
1. When the **Contact List** page is displayed click on the desired contact name in the list.
2. Click on the **Edit** button in the menu bar or click the **Edit** icon in the tools column on the far left.
3. Click **Save** in the **Contact** dialog box when your updates are done.

Deleting a Contact

1. When the **Contact List** page is displayed click on the desired contact name in the list.
2. Click on the Delete button in the menu bar or click the Delete icon in the tools column on the far left.
3. Click **OK** in the delete confirmation dialog box.

Contact Email Feature

Emailing your company contacts just got easier for your customers and prospects. When visitors to your website **Contact** page click the email address of a company contact an **Email our Staff** form will be displayed. The visitor simply needs to fill out the form, enter the security code displayed and click the **Send Request** button. Now the pre-addressed email message is on its way to your contact.



Note The website has been modified so email addresses are more difficult for spammers to retrieve by crawling your web pages. This will help to eliminate junk email from your company email system.

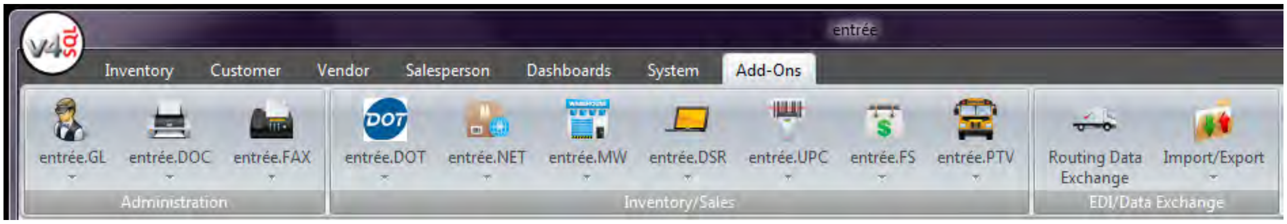
Chapter 7

Scheduler/Data Export/Order Import

7 Scheduler/Data Export/Order Import

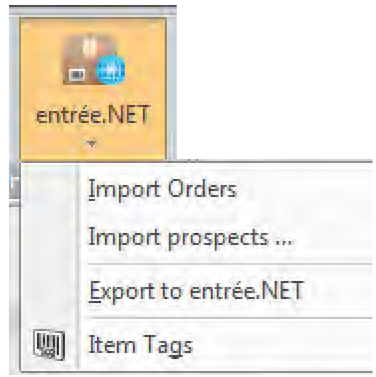
entrée V4 SQL - Export / Import / Item Tags

In **entrée V4 SQL** the **entrée.NET** icon and drop down menu are activated in the **Add-Ons** ribbon menu for customers who have purchased the **entrée.NET** add-on module.



entrée V4 SQL entrée.NET Options

- **Import Orders**
- **Import Prospects**
- **Export to entrée.NET**
- **Item Tags**



- **Import Orders -** Processing orders from your entrée.NET system quickly and efficiently is essential for business growth. The main entrée system has an import utility to take care of this process for you in the Invoicing menu.

  There is support for printing Loading Sheets when importing orders from entrée.NET. This feature must be enabled in the "entrée.NET Options" configuration dialog located in the Additional Features section of the System Options tab in System Preferences. Refer to the Using the System Menu chapter for details about updating the configuration in the Additional Features section.

  When the option is enabled the Loading Sheet for invoices created from entrée.NET orders will automatically be printed to the configured "Loading Sheet" printer as part of the order import process.

- **Import Prospects -** You have the ability to generate new customer accounts from the entrée.NET "Prospects" feature. The purpose of the "Prospects" feature is to provide the distributor with a set of tools which can be used by the distributor and your salespeople to manage and prepare quotes for potential customers.

  Prospects which have been flagged for conversion to customers in entrée.NET can be imported by selecting "Import Prospects ..." from the "entrée.NET" menu.

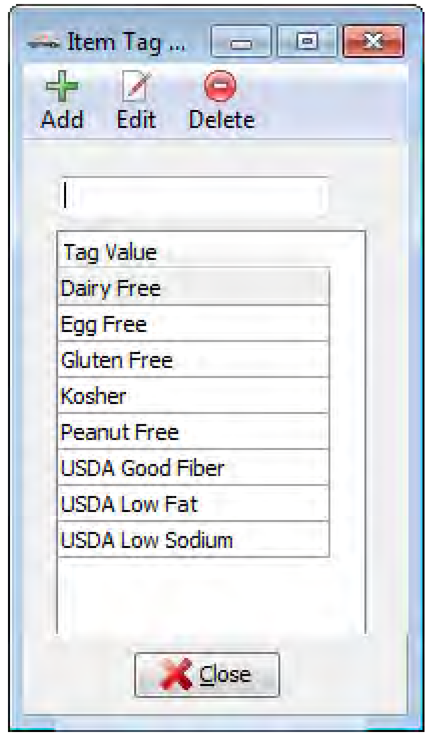
- **Export to entrée.NET -** Ensuring that the information in entrée.NET is synchronized with the main entrée system can be a time consuming task. The entrée.NET Scheduler works with the entrée export utility to automate this process for you.

  It can be set to update your entrée.NET system as often as every hour. Once the entrée.NET Scheduler is set up and enabled you can be sure you are providing your customers and salespeople with an updated catalog, with accurate prices and product information.

The export process supports sending the correct shipping address for "One Ship" customers. Full support for a "One Ship" addresses is built into the system.

- **Item Tags -** The "Item Tags" utility is located in the **Add-Ons** ribbon menu **entrée.NET** drop down menu. It allows you to maintain a list of item tags for use on the .NET Tab in Inventory File Maintenance.

The "Item Tags" feature provides an alternative method for grouping items in the entrée.NET system which is independent of their "Class" values.



Example This feature could be used to identify all Kosher or Gluten-free items regardless of how they are normally classified in entrée itself. An item may also have multiple tags associated with it.

Use the **Add**, **Edit** and **Delete** buttons to make changes to your master Item Tag list.

For more information about the **Add-Ons** ribbon menu **entrée.NET** feature go to: [entrée V4 SQL KnowledgeBase] the entrée V4 SQL System Guide KnowledgeBase.

entrée V4 SQL Export to entrée.NET

1. Sign-in to the **entrée V4 SQL** system.
2. Go to the **Add-Ons** ribbon menu and click the **entrée.NET** icon drop down menu.
3. Select **Export to entrée.NET** and the export will run.
4. The **entrée.NET** Version 3 Export Utility dialog box will display.
5. Enter your username and password to sign-in to your **entrée.NET** account.
6. Click **Next** to continue.
7. The rest of the steps are the same as the **entrée V3** manual export process later in this chapter.

entrée V3 - Import / Export

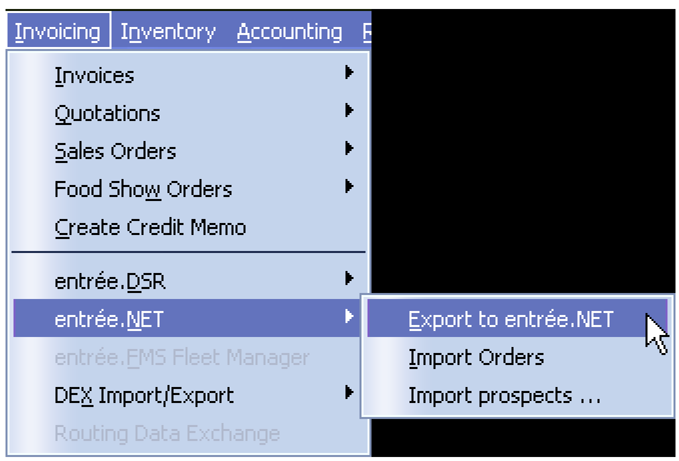
Ensuring that the information in **entrée.NET** and the **Electronic Order Pad** are synchronized with the main **entrée** system is accomplished using the **entrée.NET Scheduler**. The Scheduler works with the **entrée** export utility to automate the export, update and order import processes for your company.

The System Administrator will use the **entrée.NET Scheduler** utility to setup a daily schedule of data exports from **entrée** as well as order imports from **entrée.NET.** This will take care of synchronizing the data in all three systems. The **entrée.NET Scheduler** should be run on a computer with Internet access.

entrée.NET Scheduler utility can be set to update your **entrée.NET** system and the **Electronic Order Pad** as often as every hour. Once the **entrée.NET Scheduler** is set up and enabled you can be sure you are providing your customers and salespeople with an updated catalog, with accurate prices and product information.

Note After you install **entrée** version 3.5.1 or later the **entrée.NET Scheduler** is automatically placed in your Windows Start menu.

Processing orders from your **entrée.NET** system quickly and efficiently is essential for business growth. The main **entrée** system has an import utility to take care of this process for you in the Invoicing menu.

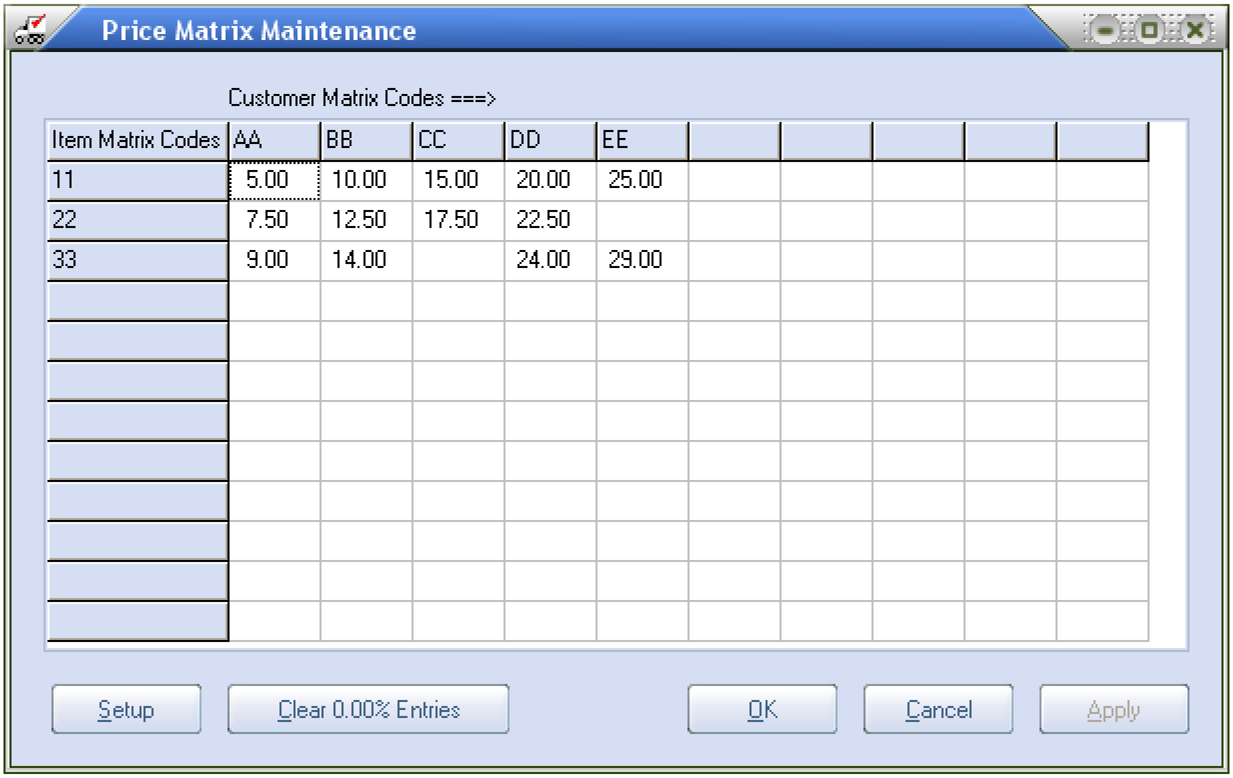


The **Export to entrée.NET** and **Import Orders** utility are located in the **Invoicing** menu in the main **entrée** system.

Support for Matrix Code Pricing

The **entrée.NET Export Utility** in the main **entrée** system can export the data required to support Matrix Code Pricing and update **entrée.NET** and **Electronic Order Pad** (requires **entrée** version 3.6.8 or later).

Matrix code pricing requires distributors to assign matrix codes to each of their item's and to each of their customers in the main **entrée** system.



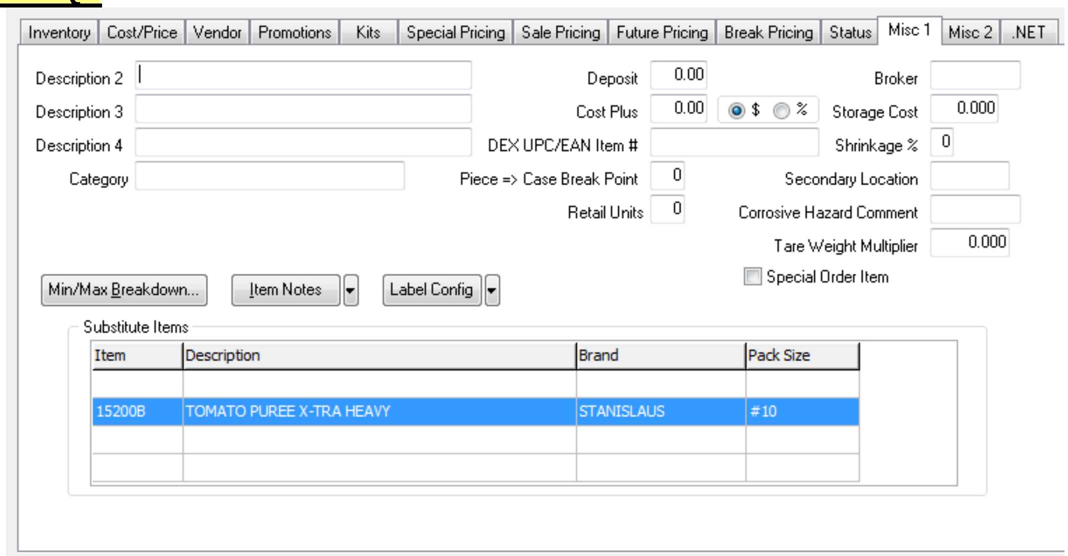
Markup percentages are then defined, using the **entrée** Price Matrix utility. The markup % of the item is determined by the percentage value found at the point in the matrix where the customer and item matrix code intersect. The markup % is then applied to item's base cost to determine the unit price.

- For more information about Matrix Code Pricing please consult the **entrée V3 Knowledgebase** in our website.

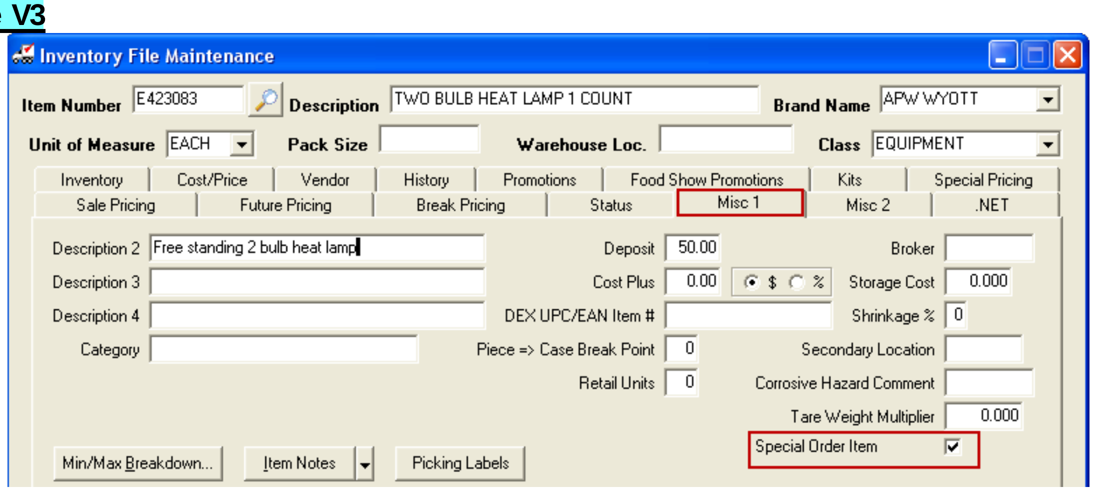
entrée - Support for Special Order Items

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

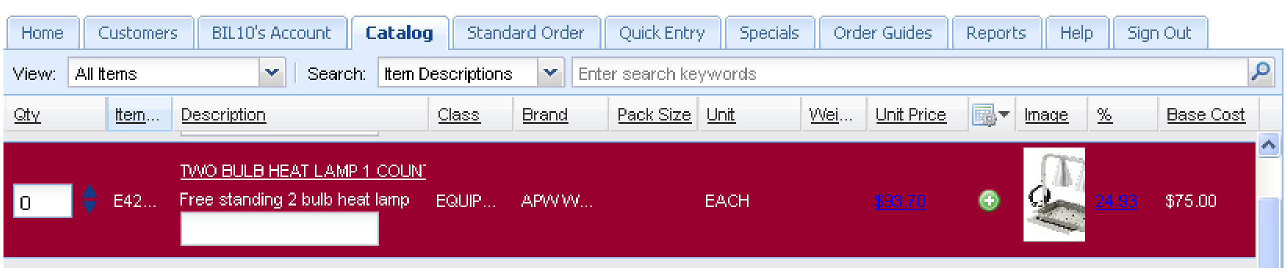
entrée V4 SQL



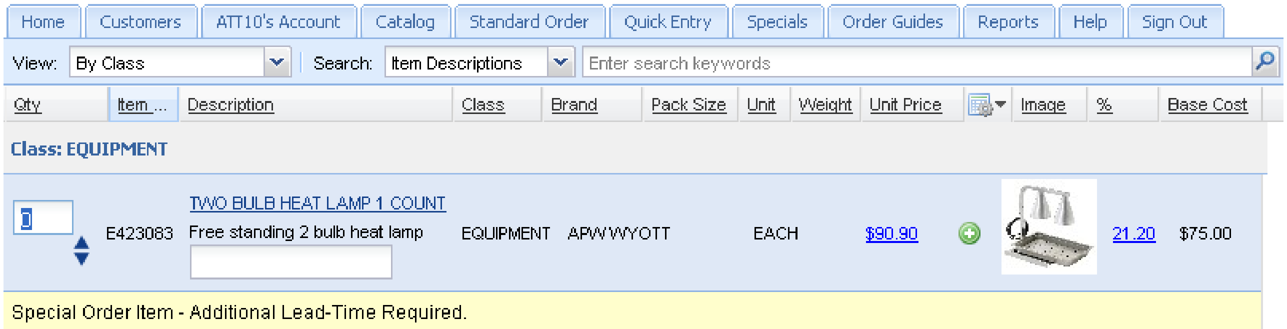
entrée V3



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



After selecting with Special Order items in **entrée.NET** and **Electronic Order Pad** they will be displayed in your product **Catalog** tab screen using a blue background for the item with a Special Order Item message below it with a yellow background color as seen here (requires **entrée** 3.6.7 or later).



- For more information about **Inventory File Maintenance** please consult the **entrée V3 Knowledgebase** in our website.

entrée V3 - Export to entrée.NET

This section will detail how to do a manual export of your data from **entrée V3** to your remote **entrée.NET** server.

- For **entrée V4** instructions see the **entrée V4 SQL Export to entrée.NET** topic at the beginning of this chapter.

1. Sign in to your main **entrée** system.

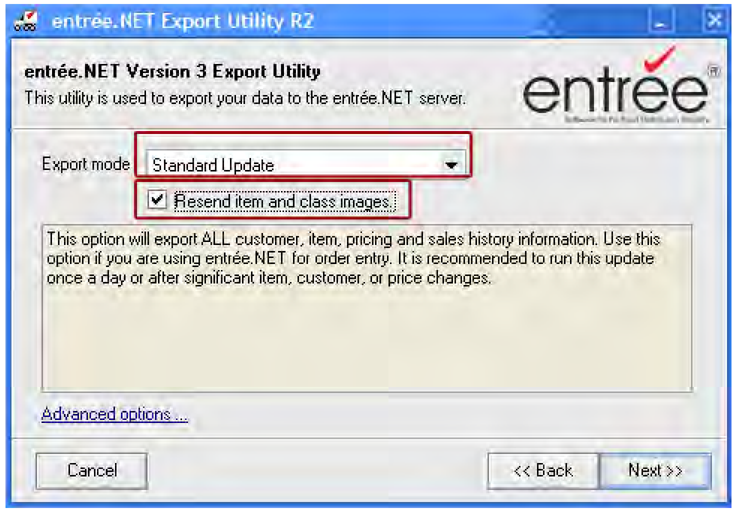
   Use menu path: **Invoicing** > **entrée.NET** > **Export to entrée.NET**

2. The **entrée.NET** Export Utility dialog box will display. Enter your username and password to sign in to your **entrée.NET** account. Click **Next** to continue.

3. Check the **Resend item and class images** option if you have updated images for item/class in **entrée.**

Note The maximum image size supported by **entrée.NET** has been increased to 550 x 550 pixels.

Your customers may now click on item images in the grid or on the "Item Information" pop-up window to view a larger version of the product image.



- Images can be added to items in the main **entrée** system via the **Misc2** tab in **Inventory File Maintenance**. Then you **must** run a "Standard Update" export and check off the "Resend item and class images" option to send new images to **entrée.NET**.

4. Now select the data you wish to transmit to **entrée.NET**. Use the **Export Mode** drop down menu to make your data selection.

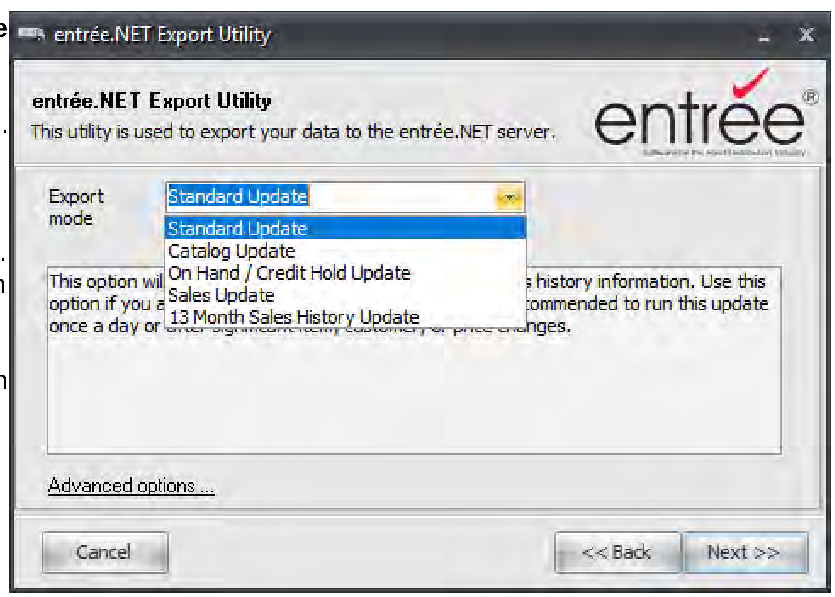
- **Standard Update** This option will export ALL your customers, items, pricing and sales history information. Use this option if you are using **entrée.NET** for order entry.

- **Catalog Update** This option will only export item information. No pricing information will be transmitted. Use this option if you are only using the public catalog or need to publish just item updates.

- **Sales Update** This will only transfer pending invoice changes.

- **On Hand / Credit Hold Update** This option will only export item inventory "On Hand" quantity and customer credit hold status.

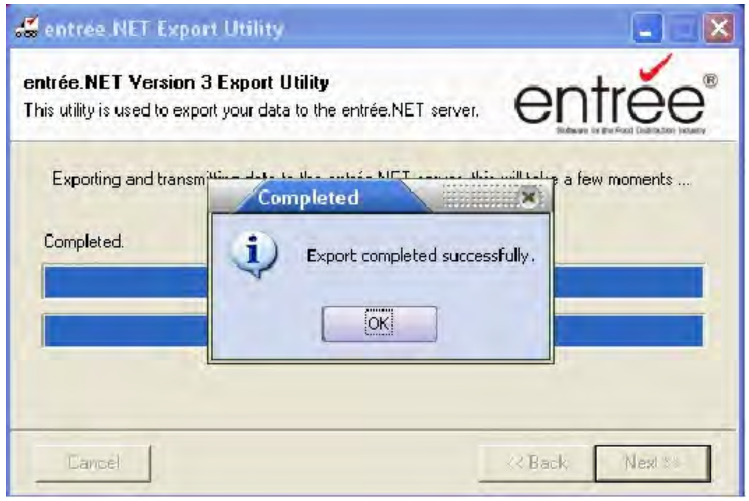
- **13 Month Sales History Update** This option will export 13 months of invoice sales data. This option only needs to be run once to provide history for the online customer report system. These updates are included with the "Standard Update" export option.



5. Click **Next**. The export utility will now begin exporting and transmitting your data. The progress of your export will be displayed using the blue bars.

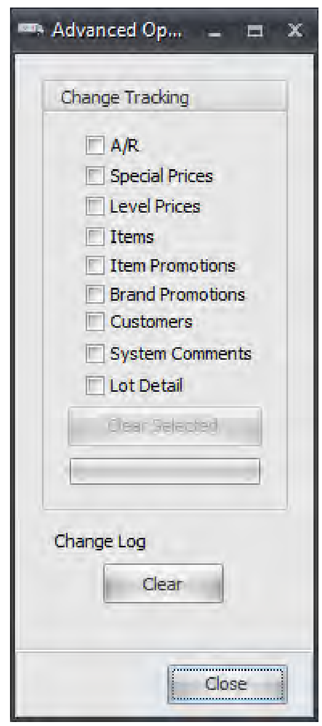
6. Once the export utility is done the **Completed** dialog box will display to confirm the export.

   Click **OK.** Your current data is now loaded in **entrée.NET.** Your system is ready for customers to place their orders.



entrée.NET Export Utility Advanced Options

The "**Advanced Options**" button in the export utility allows you to clear out selected sections of the new change tracking file.



WARNINGS

1. Do NOT use the Advanced Options unless NECS Tech Support directs you to use it!

2. Use of this option will delete the table data that is checked.

entrée V4 SQL

1. Use menu path: **Add-Ons** ribbon menu > click the **entrée.NET** icon drop down menu > **Export to entrée.NET** > sign-in > **Advanced options** button.
2. Then check the table data in the **Advanced Options** dialog box shown on the right. Choose from A/R, Special Prices, Level Prices, Items, Item Promotions, Brand Promotions, Customers, System Comments and Lot Detail.
3. Click the **Clear Selected** button. It will run.
4. Click **Close** when done.
5. Now for **Export mode** select "**Standard Update**" from the drop down list.
6. Click **Next**. The export utility will now begin exporting and transmitting your data. The progress of your export will be displayed using the blue bars.
7. Once the export utility is done the **Completed** dialog box will display to confirm the export. Click **OK.**

entrée V3

1. Use menu path: **Invoicing** > **entrée.NET** > **Export to entrée.NET** > sign-in > **Advanced options** button.
2. Then check the table data in the **Advanced Options** dialog box shown on the right. Choose from A/R, Special Prices, Level Prices, Items and Customers.
3. Click **Close**.
4. Then for **Export mode** select "**Standard Update**" from the drop down list.
5. Click **Next**. The export utility will now begin exporting and transmitting your data. The progress of your export will be displayed using the blue bars.
6. Once the export utility is done the Completed dialog box will display to confirm the export. Click **OK.**

entrée V4 SQL - Inventory .NET Tab Options

The options related to the entrée.NET add-on module including Item Tags and the "Exclude item from export" to .NET check box are located on the **Inventory** ribbon menu > **Inventory** option > find the item > **.NET Tab**.

- **Exclude item from export -** NECS has built into the main entrée system the ability for you to exclude any of your inventory items from export to your entrée.NET online ordering system. Check the box to activate this option. Reference the entrée.NET Administrator's Guide chapter Scheduler/Data Export/ Order Import / for detailed information.

- **Exclude item from public website catalog -** This option has been added to be used to tailor the items listed in your public website catalog since you may not want every item you sell to be shown. When this option is checked that specific item will still be listed during order entry for salespeople and for logged-in customers in entrée.NET and the Electronic Order Pad, but these items will not be listed in your public website catalog.

- **Restricted Item -** Define items to be "restricted", as a general rule, from entrée.NET, so that they will not appear to the customer when they are placing their order online, searching for items, etc. However, what makes this enhancement unique is that if the customer does have the item defined in the Customer Special Price/Standard Order file, they will still be allowed to purchase it, and it will be displayed to them when placing an online order. You can use this feature for situations such as a special order item, that you purchase for a specific customer (or group of customers), that your normal customer base is not allowed to order. An item may be set as restricted by checking the box for "Restricted item".

- **Allow item to be sold at $0.00 -** Provides support for selling items at no cost to the customer. This option has been added to assist distributors with in dealing with manufacturer product giveaways. Checking this option on an item allows it to be displayed in entrée.NET and added to an order with no price. For salespeople this will allow them to change the price for the item to $0.00 even if a valid non-zero price was calculated by the system.

Order Entry Section

- **Enable .NET Min / Max Quantity Warning -** For your customers placing online orders with entrée.NET, you can now define a "minimum" and "maximum" item quantity that they are allowed to order. This feature will allow you to enforce minimum order quantities for specific items and maximum order quantities.

For specific items the minimum and maximum quantity numbers must be defined in the entrée V4 system first. Follow these steps:

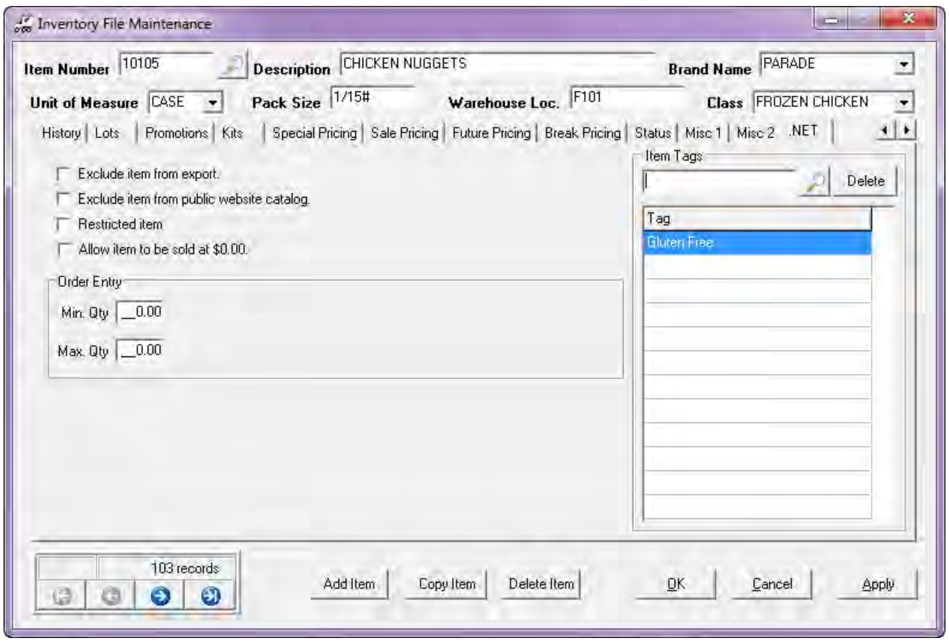
1. Go to the Inventory ribbon menu select Inventory and find the item in the Inventory file.
2. Click the **.NET tab**.
3. Enter the **Min Qty** and **Max Qty** values and click **Apply** then click **OK**.
4. Next you must enable the min/max feature in the entrée.NET system settings. See the entrée.NET Settings **Options** section of this guide for details.

Item Tags Section

- Item Tags provide an alternative method for grouping items in the entrée.NET system which is independent of their "Class" values. Use the search tool to find the item tags to assigned to the item.
  - This feature could be used to identify all Kosher or Gluten-free items regardless of how they are normally classified in entrée itself.
  - An item may have multiple tags associated with it.
  - Item Tags are assigned to items using the Item Tags search feature.
  - The Item Tags list works similar to "Class" where defining a new tag value will automatically add it to the list of available tags.

entrée V3 - Inventory .NET Tab Options

NECS has built into the main **entrée** system the ability for you to exclude any of your inventory items from export to your **entrée.NET** online ordering system.



- **Follow these steps to perform the items updates in entrée V3**

1. Login to your **entrée V3** system.
2. Menu path: **File** > **Inventory File Maintenance**.
3. Find the desired inventory item.
4. Click on the **.NET tab**.
5. The options are the same as those described in the **entrée** V4 Inventory NET Tab Options section above.

   Use the search tool to find the item tags to assigned to the item.
6. Once your selections are made click **Apply** then click **OK**.
7. **For both V3 & V4** - Once you have completed marking individual inventory items for exclusion you will need to export this updated inventory data to **entrée.NET**. There are two ways the export to **entrée.NET** can be run:
   a. The **entrée.NET Scheduler** will export data at the next scheduled run time.
   b. Or the updates can be done immediately by following the manual directions to **Export to entrée.NET** above**.**
      - In **entrée V3** use menu path: **Invoicing** > **entrée.NET** > .
      - In **entrée V4 SQL** use menu path: **Add-Ons** ribbon menu > **entrée.NET** option drop down menu > **Export to entrée.NET.**

7.1 Importing Orders / Prospects

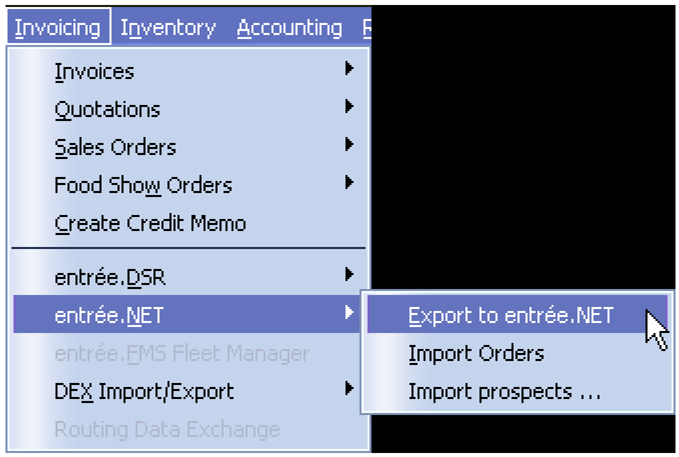
entrée V4 SQL - Imports

1. Sign-in to **entrée V4 SQL**.
2. Go to the **Add-Ons** ribbon menu and select the **entrée.NET** option drop down menu.
3. Select either **Import Orders** or **Import prospects**.
4. The rest of the steps from # 3 for V3 that follows will be the same.

entrée V3 - Imports

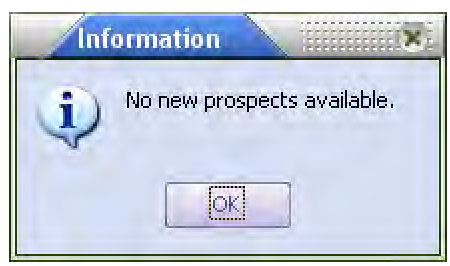
To process your customer orders from **entrée.NET**, you need to monitor your order submission emails and import orders as needed into the main **entrée** system.

1. Sign-in to the main **entrée V3** system.
2. Use menu path: **Invoicing** > **entrée.NET** > select either **Import Orders** or **Import prospects**.
3. An **Import** progress box will display while the selected import automatically runs.

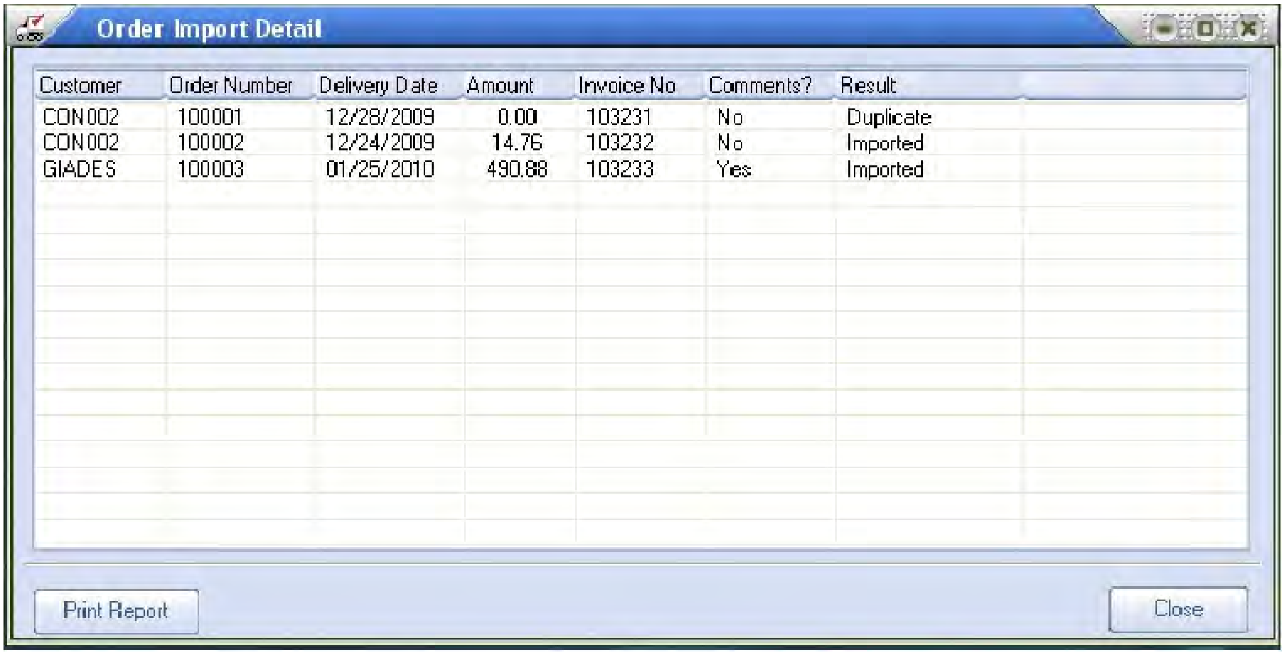


4. When the import is done the progress box displays “**Order import completed**.”.

Note If no new Orders or Prospects are available for import then one of the messages here will be displayed.



5. The **Order Import Detail** report is displayed with the results of the import process.
Use the **Print Report** button to generate a .pdf file to print or save the report. This report can be used to reconcile any order import problems by checking the **Result** column.

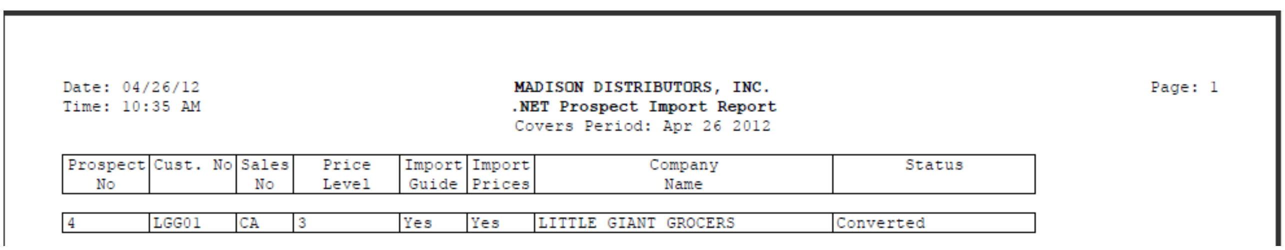


Order Import Detail

Customer	Order Number	Delivery Date	Amount	Invoice No	Comments?	Result
CON002	100001	12/28/2009	0.00	103231	No	Duplicate
CON002	100002	12/24/2009	14.76	103232	No	Imported
GIADES	100003	01/25/2010	490.88	103233	Yes	Imported

Print Report Close

The **.Net Prospect Import Report** will automatically bring you to the **entrée** Re3 report generating system. Here you can print a hard copy of the report or create a report PDF file to save or email. Below is an example of the PDF report.



Date: 04/26/12 MADISON DISTRIBUTORS, INC. Page: 1
Time: 10:35 AM .NET Prospect Import Report
Covers Period: Apr 26 2012

Prospect No	Cust. No	Sales No	Price Level	Import Guide	Import Prices	Company Name	Status
4	LGG01	CA	3	Yes	Yes	LITTLE GIANT GROCERS	Converted

Note Refer to the **Prospects Tab** chapter to learn about the conversion process required for preparing a Prospect for import into the main **entrée** system.

6. Once the orders are imported each customer will receive a confirmation email thanking them for their order. The email also contains the order number, assigned invoice number and a link to view their order.

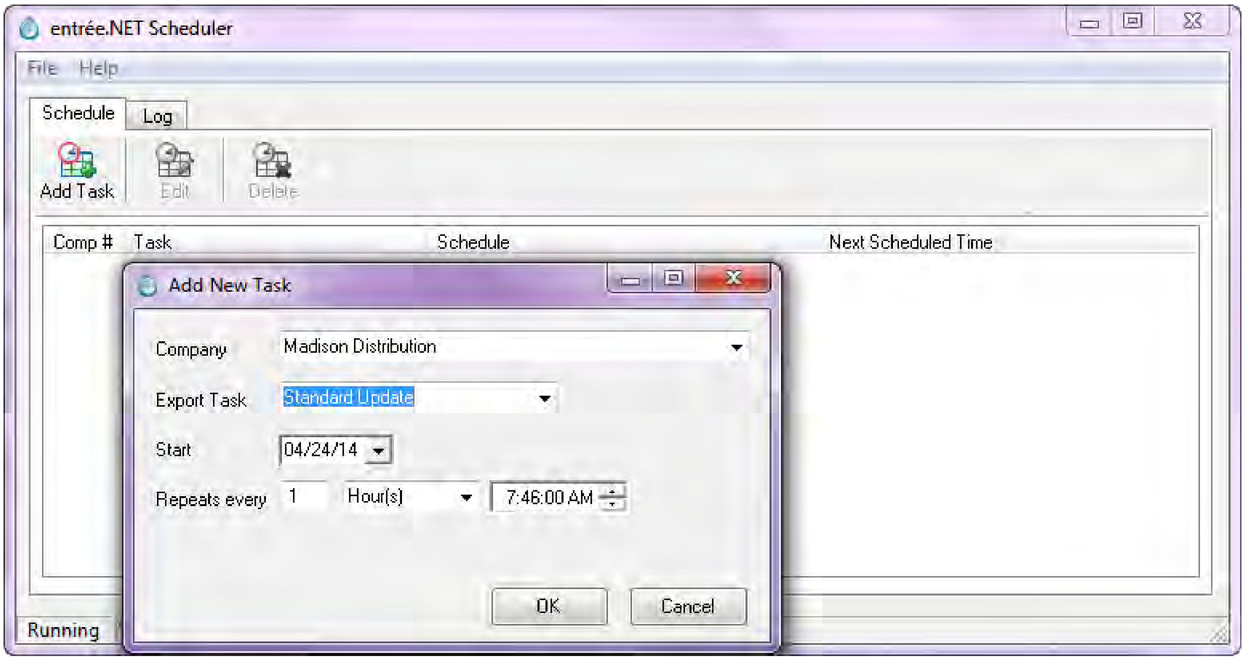
Importing New Orders Automatically

Instructions for this task are located in the **entrée.Net Scheduler** section which is next in this chapter.

7.2 entrée.NET Scheduler

entrée V4 SQL

The **entrée.NET Scheduler** is automatically placed in your Windows Start menu after you install **entrée version 4**. Everything in the scheduler will work the same as documented below for **entrée V3**.



entrée V3

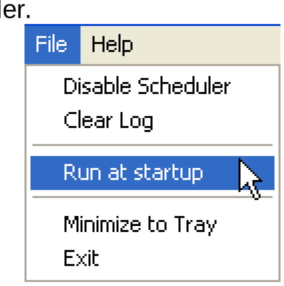
The **entrée.NET Scheduler** is automatically placed in your Windows Start menu after you install **entrée** version 3.5.1 or later.

The **entrée.NET Scheduler** is a utility used to create a daily schedule of automated processes that will export data from the main **entrée** system into **entrée.NET** and the **Electronic Order Pad**. Implementing the Scheduler will make maintenance of the data in your **entrée.NET** and the **Electronic Order Pad** systems an effortless process. The scheduler should be run on a computer with Internet access.

- To go to the **entrée.NET Scheduler** from your computer desktop use menu path: **Start > All Programs > entrée.NET Scheduler.**

File Menu

- **Disable Scheduler / Enable Scheduler –** To stop Scheduler activity select **Disable Scheduler** in the **File** menu. When you want to resume running your Scheduler then click **Enable Scheduler** in the **File** menu.
- **Clear Log –** Clears the contents displayed in the **Log** tab of the Scheduler.
- **Run at startup –** Tells the Scheduler to automatically start when your computer is booted up.
- **Minimize to Tray** - The scheduler window will appear in the tray at the bottom of your computer screen. When the Scheduler is minimized to your tray the window name displayed is "netsched".
- **Exit –** Closes the Scheduler Utility window.



Help Menu

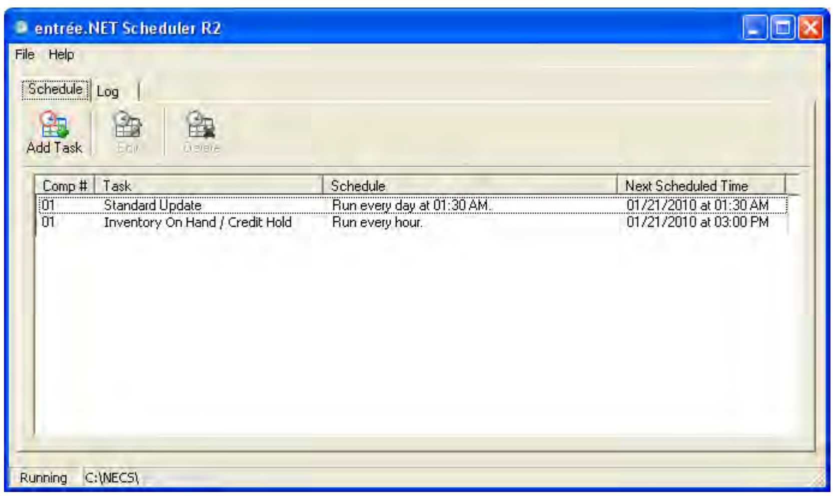
- **About –** Displays the version of the Scheduler software on your computer.

Schedule Tab

Add New Task

1. From your computer desk top use menu path: **Start** > **All Programs** > **NECS** > **entrée.NET Scheduler**

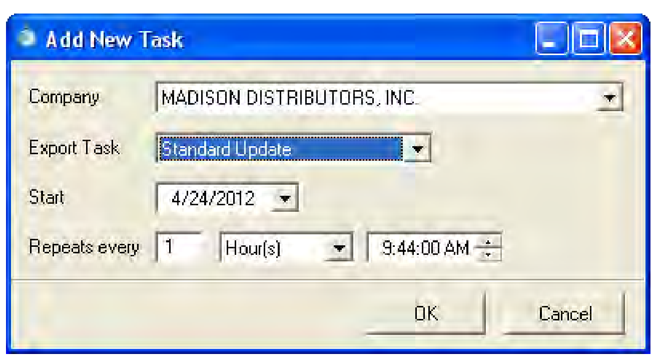
2. The **entrée.NET Scheduler** dialog window will display.



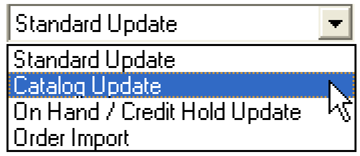
3. Click on the **Schedule** tab.

4. Click the **Add Task** button to add a new task to your Scheduler.

   The **Add New Task** dialog box will be displayed.



5**.** Select your **Company** (only if there is more than one) from the drop down list.

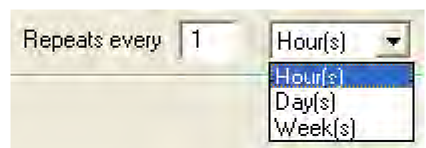


6. Select the **Export Task** from the drop down list.

- **Standard Update** - This option will export ALL your customers, items, pricing and sales history information. Use this option if you are using **entrée.NET** for order entry.
- **Catalog Update** - This option will only export item information. No pricing information will be transmitted. Use this option if you are only using the public catalog or need to publish just item updates.
- **On Hand / Credit Hold Update -** This option will only export item inventory "On Hand" value and customer credit hold status.
- **Order Import -** This option will import orders marked as complete from the **entrée.NET** server including orders from the **Electronic Order Pad**.

7. Select your **Start** date by using the arrow to view the drop down calendar.

8. In the **Repeats** section on the far right use the up and down arrows to set the **Start time** for your task.
   a. Click on the hour value and use the up and down arrows to find the desired hour.
   b. Then click on the minute value and use the up/down arrows to set the minutes.
   c. Then click on the **AM** or **PM** to set a new value using the arrows.

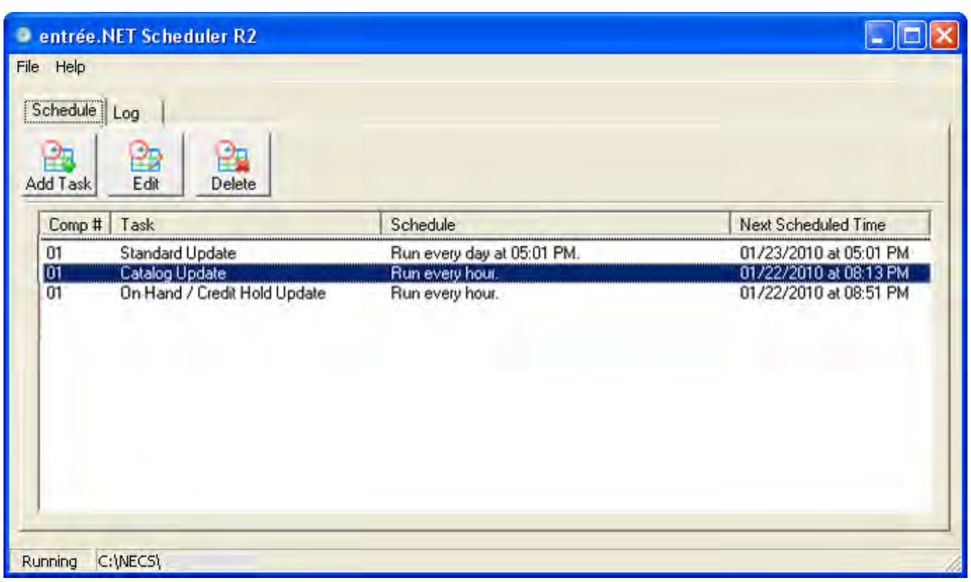


9. Set the **Repeats every** value by highlighting the current number of times value and type a new number.

10. Set the **Time Period** value by using the drop down list. Select from Hour(s), Day(s) or Week(s).

11. Click **OK** when you are done. The new tasks will be added to the **Schedule** tab as displayed below. You can now use the **Edit** or **Delete** buttons to modify tasks in the **Schedule** tab.

    The **entrée.NET Scheduler** seen below has three tasks in the schedule to run at different intervals and times.



Importing New Orders Automatically

1. To enable automatic import of new orders into your main **entrée** system use menu path: **Start** > **All Programs** > **NECS** > **entrée.NET Scheduler.**

2. The **entrée.NET Scheduler** dialog window will display.

3. Click on the **Schedule** tab.

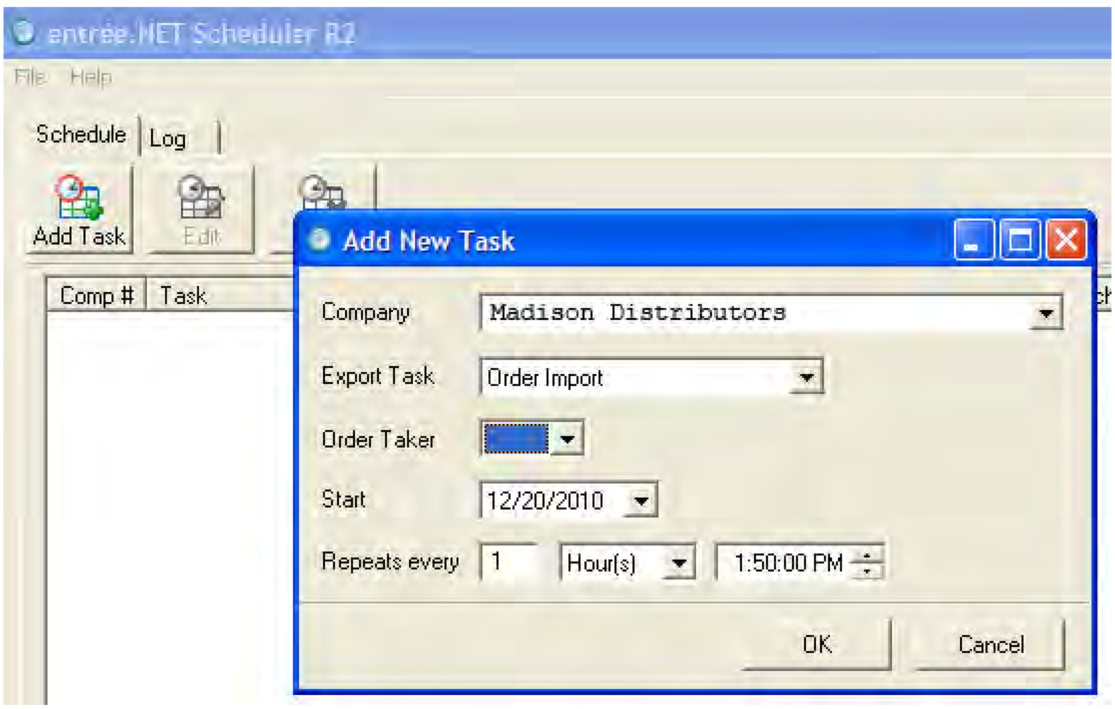
4. Click the **Add Task** button to add a new task to your Scheduler. The **Add New Task** dialog box will be displayed.

5. In the "**Export Task**" options list select "**Order Import**".

6. Select a **Start** date.

7. Fill in the **Repeats every** options as required for your business.

8. Click **OK**. The new task will be added to the **Schedule** tab.



Note When an order has successfully been imported by this feature a notification e-mail will be sent to the e-mail address(es) that are configured to receive order notifications.

Editing Tasks

1. From your computer desk top follow this menu path: **Start** > **All Programs** > **NECS** > **entrée.NET Scheduler**
2. The **entrée.NET Scheduler** dialog window will display.
3. Click on the **Schedule** tab.
4. Click the **Edit Task** button to open the **Edit Scheduled Task** dialog box.
5. Follow steps 5 – 10 from **Adding New Tasks** procedure to complete the process.

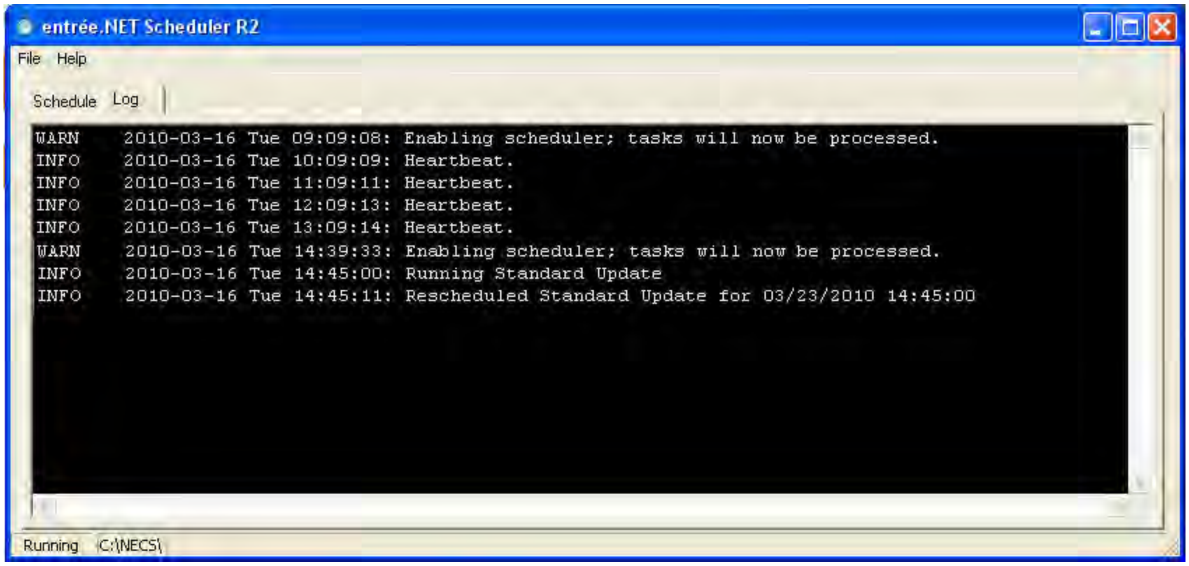
Deleting Tasks

1. From your computer desk top follow this menu path: **Start** > **All Programs** > **NECS** > **entrée.NET Scheduler**
2. The **entrée.NET Scheduler** dialog window will display.
3. Click on the **Schedule** tab.
4. Click the desired task then click the **Delete Task** button. The task is now removed from the **Schedule** tab.

Scheduler Log Tab

The **Log** tab provides a record of the activity of your **entrée.NET Scheduler**. Use the **Log** record to verify the status of updates from the main **entrée system.** Information here can be cleared by using the **Clear Log** option in the **File menu**.

When you see the status of "**Heartbeat**", this means the Scheduler did a check and communications with the server are working properly.



Chapter 8

Email Account Settings

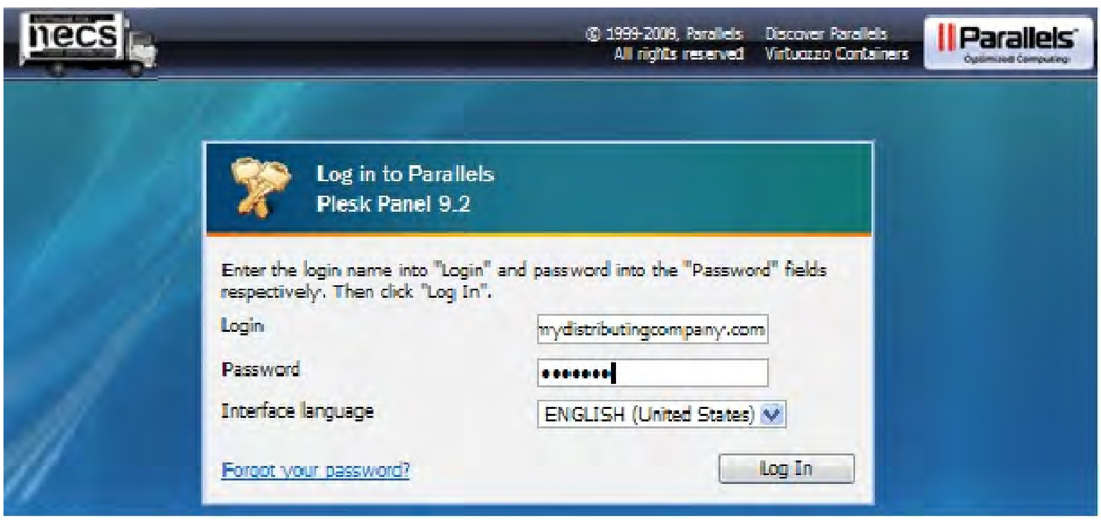
8 Email Account Settings

If you are using the **entrée.NET** option which includes a website for your company, then this chapter will be of special importance to you.

When you have your own website, such as www.mydistributingcompany.com, you can have email addresses that use your domain name. So instead of using AOL, MSN, YAHOO, GMAIL, etc. (ex: myname@aol.com) for your email, you can have your own professional email address.
An example would be: myname@mydistributingcompany.com.

Included with your **entrée.NET** website package is the ability to create 10 email accounts for your company. If you need more email accounts, please contact NECS.

The goal is that all they key people in your organization will have their own private email addresses, as well as more general email addresses such as sales@mydistributingcompany.com or service@mydistributingcompany.com.
These general types of email addresses can be used by groups of your employees, rather than just one. You will be using an online web service or "control panel' called **"Plesk**" to manage your email accounts.



Before you begin to set up your email accounts in the Parallels Plesk Panel you will need to gather some information.

1. Make a list of the email accounts you will need to create for your business. You have 10 email accounts at your disposal. As you create the email accounts write down the passwords you have assigned next to each for your records.

2. You will need the following information about your ISP (Internet Service Provider):

   a. The name of your Outbound Mail Server (SMTP), for example: "smtp.comcast.net".

   b. The type of mail retrieval server on your ISP, either POP3 or IMAP is acceptable.

3. Your inbound mail server will be: **mail.mydistributingcompany.com** (where you will substitute "mydistributingcompany.com" with your actual website domain name.)

Plesk Control Panel Login

The person who will function as your System Administrator will have access to the email administration panel that has been set up in Plesk by NECS. **Plesk** is used to manage your email accounts. To create and edit the email addresses you would like to use, you need to login to your **"Parallels Plesk Panel**".

The System Administrator login process is as follows:

1. To get to your Plesk control panel type the following URL into your browser: http://cp.mydistributingcompany.com (where you will substitute the "mydistributingcompany.com" with your actual website domain name.)

2. Enter your domain name as described in step 1 above for the **Login** field and the **Password** provided by NECS.

3. Select an Interface language if you desire. The default setting is U. S. English.

How to Create the Administrator's Mailbox

1. Login to your **"Parallels Plesk Panel**" as detailed above.

2. You will see your domain name and IP address displayed on the **Home** page.

   Use menu path: **Home** > **Create Mail Account**.

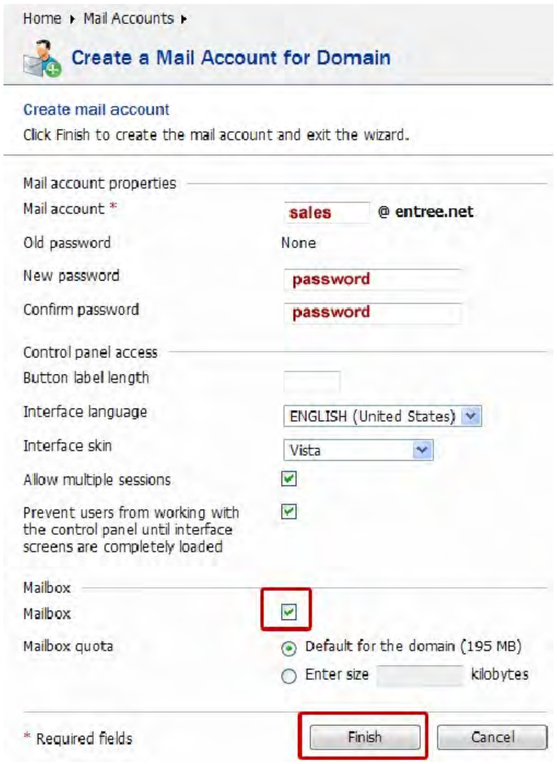
3. In the **Mail Account** field your domain name is shown to the right of @ sign, (in the example below entrée.net is the domain name.) Just enter the desired name for the mailbox here.

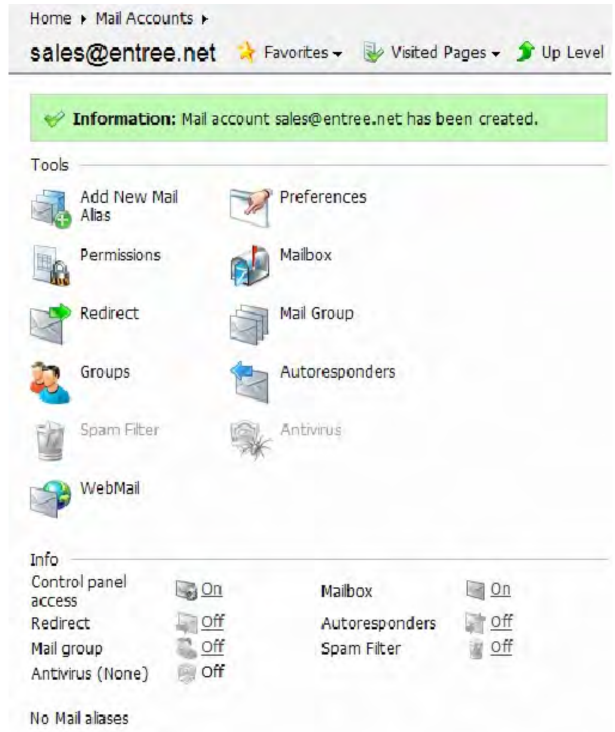
   This can be, for example, your first name and last name separated by a dot, a department name, or any other text in Latin symbols. The name should be short enough to remember. It can comprise alphanumeric, dash, dot and underscore symbols.

4. Specify a **New** p**assword** and **Confirm password** that will be used to access your mailbox.

5. Be sure to check **Mailbox.**

6. Click **Finish.** A message confirming the creation of the mailbox is displayed. You are now in the control panel for that mailbox.





Left image: To create your mailbox the only settings required are indicated in red.
Right image: The screen displayed after the mailbox creation process has been successfully completed.

Creating Mailboxes for Other Users

1. The System Administrator will login to the **"Parallels Plesk Panel**" for your domain. Use menu path: **Home** > **Create Mail Account**.

2. In the **Mail Account** field the domain name is shown to the right of @ sign, (in the example below entrée.net is the domain name.) Just enter the desired name for the mailbox here.

   This can be, for example, user's first name and last name separated by a dot, a department name, or any other text in Latin symbols. The name should be short enough to remember. It can comprise alphanumeric, dash dot and underscore symbols. Examples of full email addresses:

   Department mailbox: **sales@mydistributingcompany.com**
   Employee mailbox: **angela.zelos@mydistributingcompany.com**

3. Specify a **password** that mailbox owner will use for accessing his or her mailbox.

4. Specify the settings related to the appearance of user's control panel, if desired: interface language, theme (skin), the limit on number of characters that can appear on custom buttons placed into the control panel by the mailbox owner.

5. Leave the **Allow multiple sessions** box checked. This will allow the mailbox owner to have several simultaneous sessions in the control panel.

6. Leave the **Prevent users from working with the control panel until interface screens are completely loaded** box checked. This will forbid users from submitting data or performing operations until the control panel is ready to accept them.

7. Make sure to check **Mailbox.**

8. If required, limit the amount of disk space that this mailbox and its auto responder attachment files can use. To do this, under **Mailbox quota** select the **Enter size** option and type the desired value in kilobytes.

Note Mailbox owners should **not** have access to the Plesk control panel.

9. Click **Permissions** in the **Mail Accounts** page to configure and use spam filters, antivirus, protection and click **OK.**

How will my Business Access Email?

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

What is WebMail?

WebMail is an email service accessed via your web browser. Anywhere there is an internet connection you will be able to check your WebMail. It is not the same inbox as your mail client software running on your computer such as Microsoft Outlook.

Can I use a WebMail service to read and send email online?

Yes, NECS has already enabled WebMail in your domain’s account in Plesk Mail Preferences. A step by step procedure for WebMail login is documented below.

Accessing Your Mail Using a Web Browser:

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

How to Access WebMail

1. Open an internet browser (or a WAP browser, if you are working from a handheld device).
2. Type the URL: **http://webmail.mydistributingcompany.com**, where "mydistributingcompany.com" is the name of your domain.
3. Press **ENTER**. The WebMail login page will open.

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

- **Username -** is the department or employees full **Email Address**.

  Example An email address: **angela.zelos@mydistributingcompany.com**

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

- **Now that the mailboxes for your business have been created on the NECS server, you will need to set up your email client program to receive and send email through your new mailboxes.**

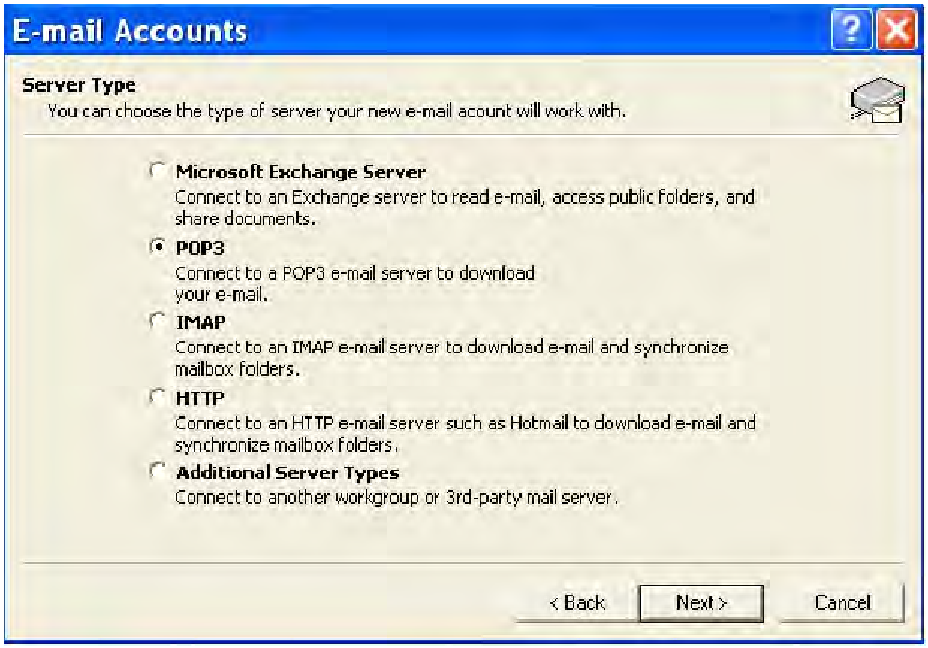
  Microsoft Outlook and Mozilla Thunderbird are two of the most common email client programs used for this purpose. You may already have one of these programs running on your business computers. Consult your email client documentation and Help topics to get the correct update process for the software used by your business. An example of the process to setup an Outlook email client program follows.

How to Setup Email Accounts in Microsoft Outlook

After you've created your email accounts in Plesk, you can add this account to your preferred Mail Client, or you can read your email using the WebMail service which is part of every hosting account.

1. Run Microsoft Outlook on the user's computer.
2. Go to the **Tools > E-mail Accounts**.
3. In the **E-mail Accounts** dialog box select **Add a new e-mail account**.
4. Click **Next**.

5. The **Server Type** dialog box will display.
6. Select **POP3** or **IMAP** for your Server Type. This information comes from your Internet Service Provider (ISP).
7. Click **Next**.



8. In the **E-mail Account** dialog box you will provide User, Logon and Server account information:

In this email account setup example the email address would actually be angela.zelos@mydistributingcompany.com.

The info@yourdomain.com email address was used for testing purposes only.

E-mail Account User Information:

- **Your name –** Enter your first and last name
- **E-mail Address -** The full email address, including the domain name, of the account you created in Plesk. E.g. **angela.zelos@mydistributingcompany.com**
- **Mail Account** represents the person's name or a department, whatever the System Administrator assigned. Substitute the "mydistributingcompany.com" with your actual website domain name.

Logon Information:

- **Username –** Is the full **Email Address** in User Information box above.
- **Password -** Is the password you entered when you created the account in Plesk.

Server Information:

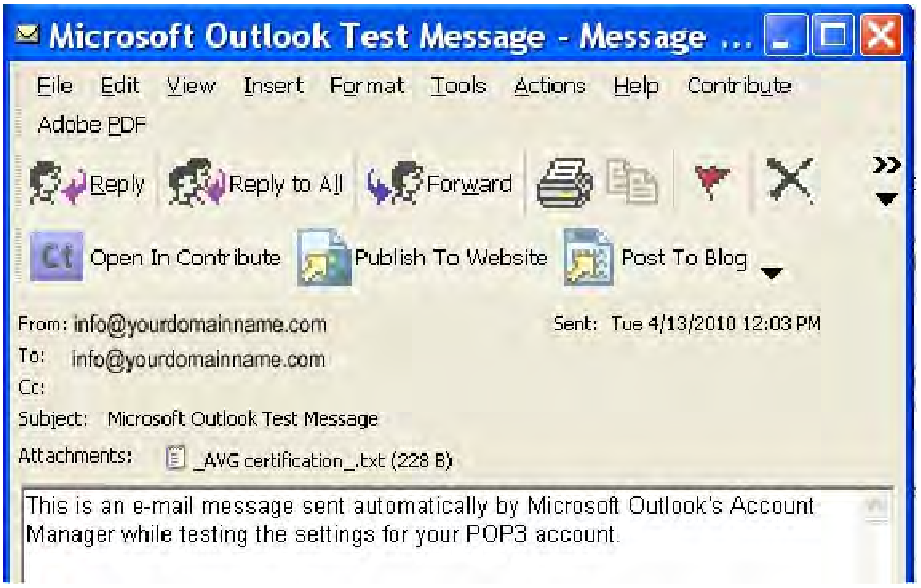
- **Incoming Mail server (POP3) - mail.mydistributingcompany.com** where "mydistributingcompany.com" is your actual website domain name.
- **Outgoing Mail Server (SMTP) -** Your Outgoing Mail Server (SMTP) is the same as your ISP's outgoing mail server. Use the same setting provided by your ISP to avoid problems delivering email.

Note Most Virus and SPAM conscious ISPs now require you to use their outgoing Mail server to help reduce the proliferation of viruses and eliminate SPAM.

9. Now click the **Test Account Settings** button. An analysis of your settings will be run. Any errors will be displayed in the **Errors** tab. Review and resolve any errors to continue.

10. If all tests were completed successfully, then click **Close**.

11. A test email has been sent to your email account as a part of the account testing process. An example of the email you will receive is displayed below.



12. Now you will be brought back to the **E-mail Accounts Internet E-mail Settings (POP3)** dialog box in step 8 above. Click **Next**.

13. The E-mail Accounts Congratulations dialog box displays. Click **Finish.**

Note This Microsoft Outlook setup process must be repeated for each user on their business computer for all your new Plesk email accounts.

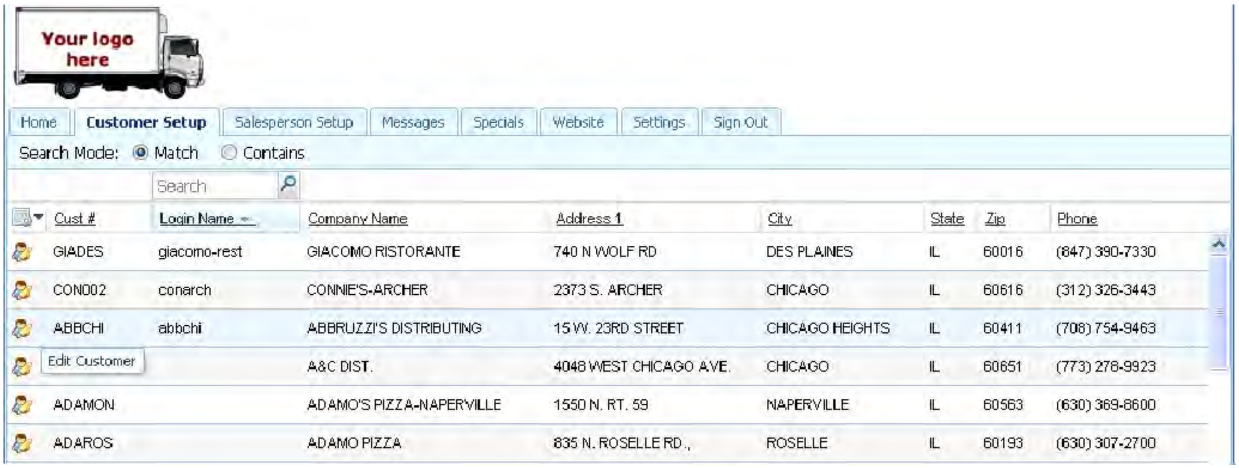
* Source: www.parallels.com ©Parallels Holdings, Ltd.

Chapter 9

Customer Setup

9 Customer Setup

When you click on the **Customer Setup** tab your **entrée** customer file is displayed. You can sort the customer file using any of the underlined column headings in ascending or descending order. In the image below the customer file was sorted by **Login Name** to view all the customers that have access to **entrée.NET**.



- Click the tools icon to view the drop down menu to add or remove columns from your display. Check the box to add a column and remove the check to delete a column from the grid.
- Column width can be modified by clicking and dragging the right or left column border in the headings section.
- Search for a specific customer by typing a word or letters in the Search box. Then select your **Search Mode** either Match or Contains. Click the search icon to get your search results.
- Click the edit customer icon to view the customer's account information.
- To add new customers or update existing customer information use **Customer File Maintenance** in the main **entrée** system. Follow the menu path for your version of **entrée**. Then the next export to **entrée.NET** will update the customer information.

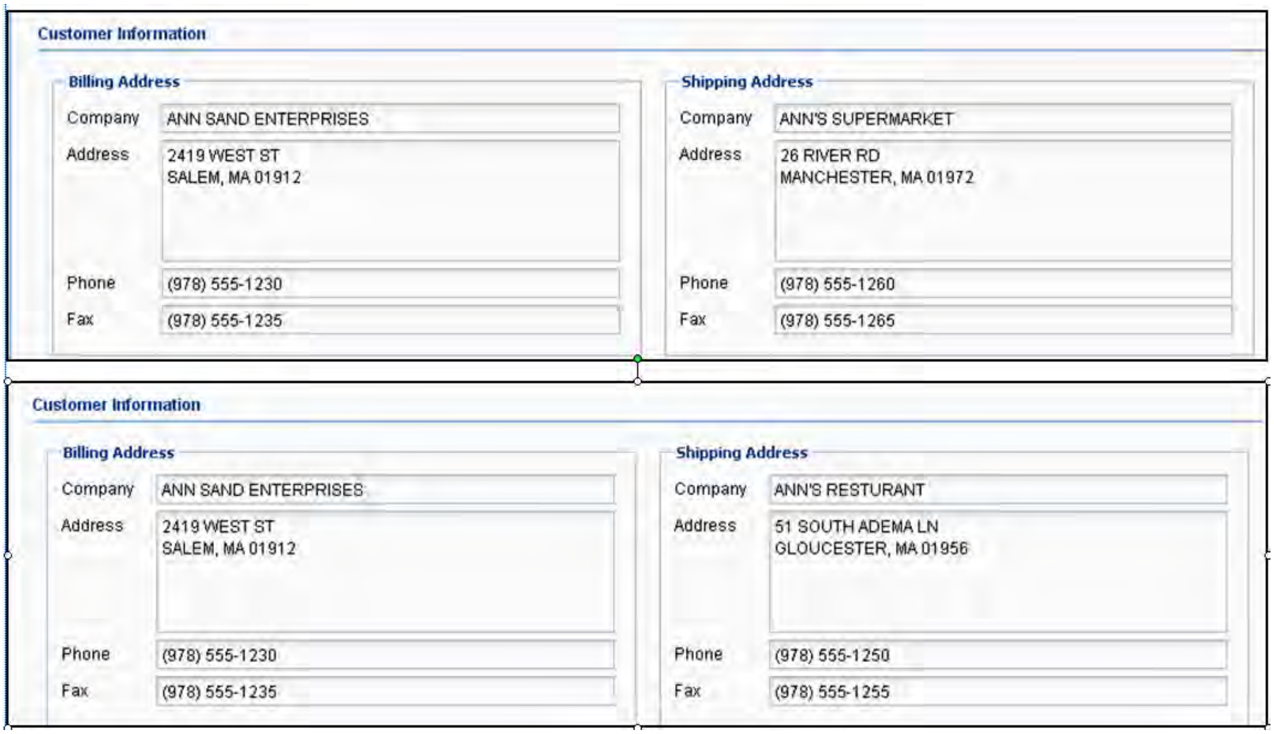
entrée V4 SQL - Go to the **Customer** ribbon menu > select the **Customer** option > click **Add** and enter your new customer's information.

entrée V3 - Go to the **File** menu > select **Customer File Maintenance** > click **Add** and enter your new customer's information.

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

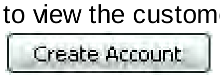
"One Ship" Customer

The two images here the **entrée.NET Customer Setup** tab shows the same central office used for the Billing Address for their multiple businesses and locations in the Shipping Address. This information is maintained in Customer File Maintenance and exported from the main **entrée** system.



Creating a Customer Account

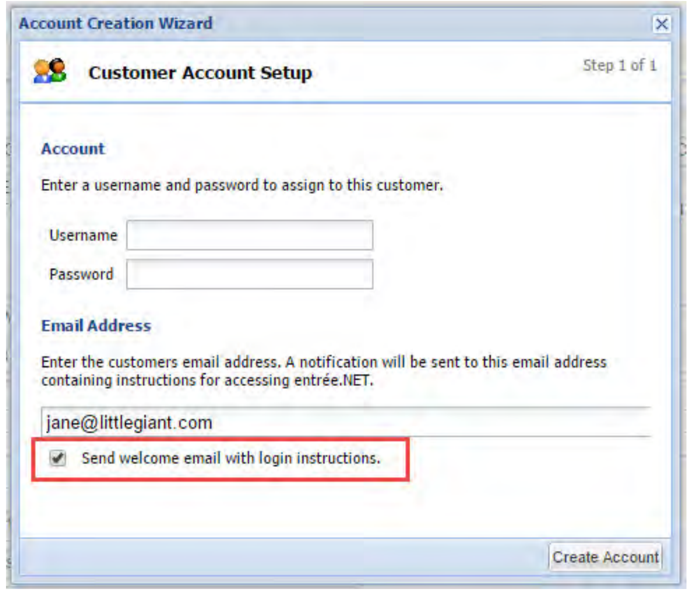
When a customer requests access to your **entrée.NET** system you will need to create an account and assign a username and initial password. Once they have this information your customers can sign in and submit orders at their convenience. Follow these simple steps to create your customer accounts:

1. Click on the **Customer Setup** tab.
2. Use the **Search** tool to find the customer requesting an **entrée.NET** account.
3. Click the edit customer icon  to view the customer's account information.
4. Click the **Create Account** button. 

The **Customer Information** and **Configuration** sections are view only in **entrée.NET**. This information must be edited in your main **entrée** system.

5. The Account Creation Wizard displays the **Customer Account Setup** dialog box.

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



7. **Email Address** section

- Enter the email addresses where your customer wants to receive their account setup information and order confirmation emails.

- **Send welcome email with login instructions**

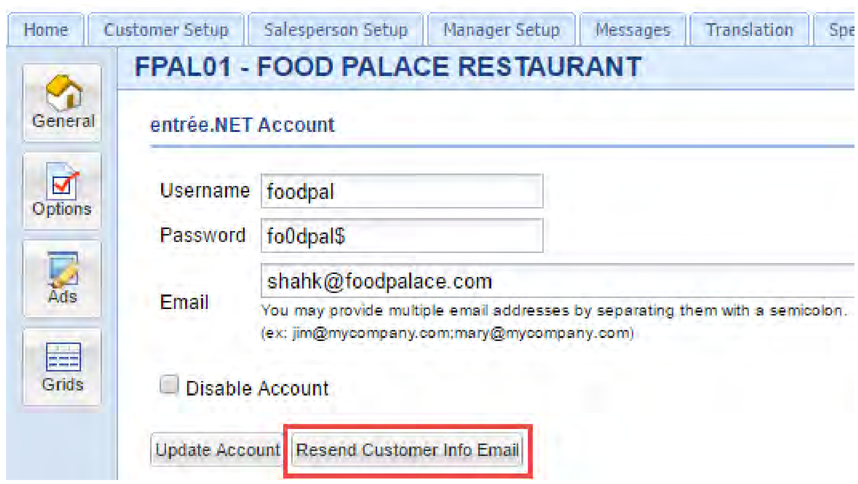
  Leave this option unchecked if you do not want an email sent to the customer.

  Salespeople must have Settings tab, Salespeople **Option** #14, Allow Salespeople to setup entree.NET accounts for customers, checked to be able to use this feature.

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

9. Now a Customer Account Setup email will be sent, if the **Send welcome email** option was checked, to your customer's email address. Multiple email addresses can be entered for the customer by separating the email addresses with a semi colon (**;**).

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



Resend Customer Info Email

The **Resend Customer Info Email** button has been added to **Customer Setup** page. This feature gives distributors the ability to re-send a customer their account information including their username and password via email.

Forgotten Password

Your customers will have the ability to use an automated process to reset their password through your website. The customer will go to your website or login screen and enter their username in the password reset section.

This action will trigger an email sent to their account email address. This email will contain a temporary password and link to the password reset page.

The customer will enter their username, temporary password and their new password here. If all the information has been entered correctly, their password will be reset in the **entrée.NET** system.

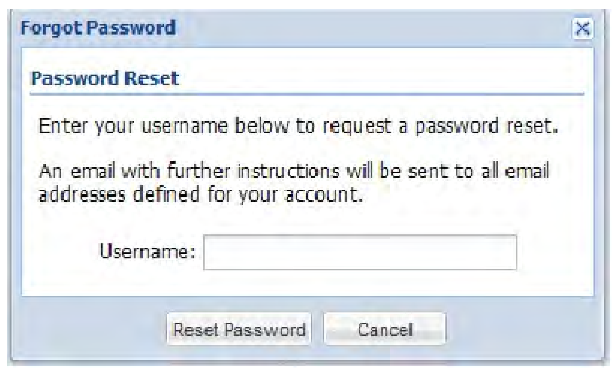
Website customer login area and **Forgot Password** link.

Login screen for distributors who do not have the **entrée.NET** website module with the "Forgot Password" button.

Password Automatic Reset Process

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

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



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

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

Sample email message text:
You have requested to reset your account password. In order to do so we have provided you with temporary password for your account.

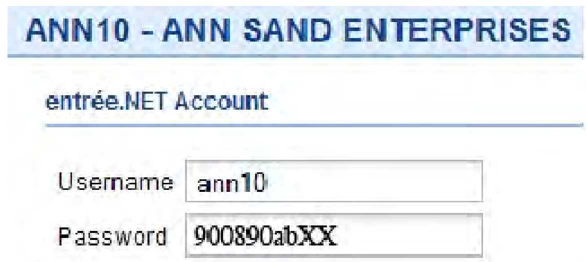
Your temporary password is: rm4zuth2
Please follow the link below to complete the password reset: http://yourNET.com.

Viewing / Resetting a Customer Password

There will be occasions when your customer has lost their password and the password reset procedure did not work for them for some reason.

The new password storage system installed with **entrée.NET** release 3.2.1 will allow you to view customer and salesperson account passwords.

The new system uses a key based encryption system to maintain a level of security but still allow for viewing the passwords.



A process has been put in place to convert the passwords as customers and sales people login. So there will be some delay before all passwords are viewable.

- **To create a new temporary password follow these steps:**

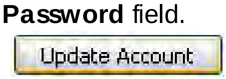
1. Click on the **Customer Setup** tab.

2. Use the **Search** tool to find your customer.

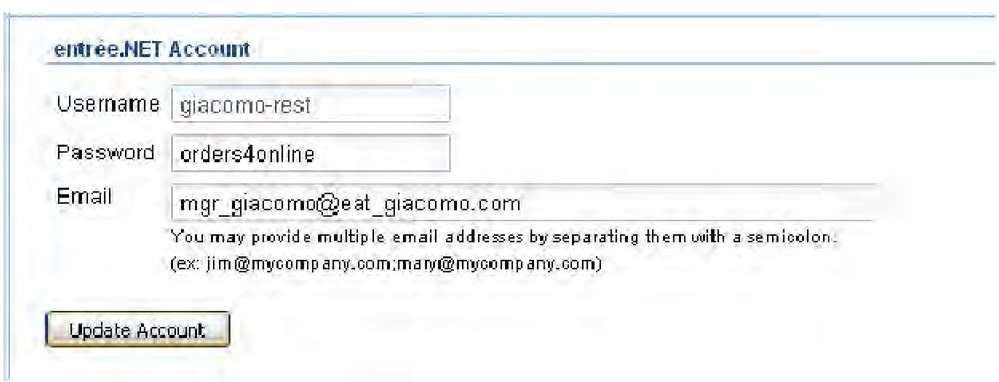
3. Click the edit customer icon  to view the customer’s account information.

4. Go to the **entrée.NET Account** section. Once you have created the customer’s account the **Password** field will be blank.

5. Type a new password in the blank **Password** field.

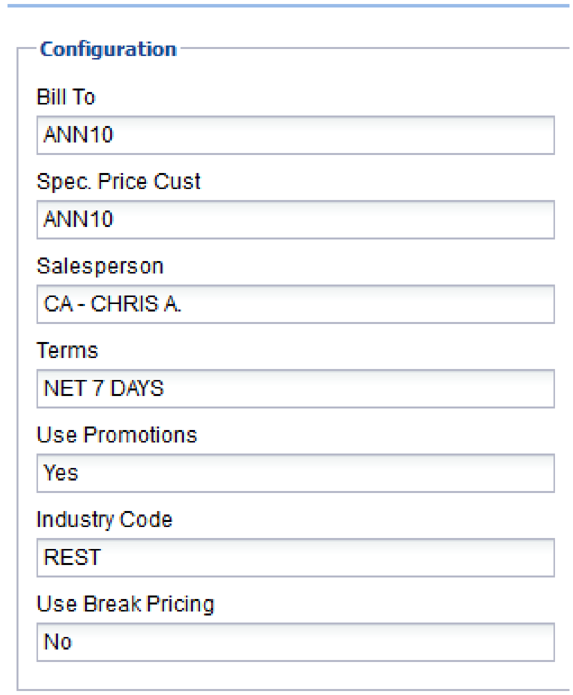
6. Click the **Update Account** button. 

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



Customer Configuration Settings

The **General** screen contains the Billing Address and Shipping Address information.

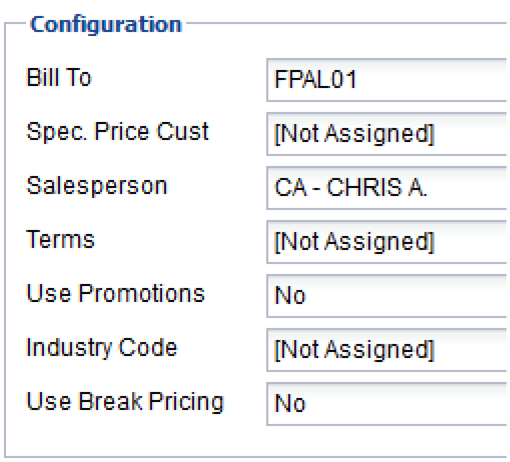


The customer's account **Configuration** information from the main **entrée** system can be found below the Billing Address area.

Configuration information includes:

- Bill To
- Spec. Price Cust
- Salesperson
- Terms
- Use Promotions
- Industry Code
- Use Break Pricing

Example Here is a new customer without some of the configuration set up yet in the main **entrée** system.



When the Customer file is updated with Terms in **entrée** and the export to .NET is run you see the results on the right.

Setting Options for Customers

The next step in account creation requires you to set the system options for your customer in **entrée.NET**. These are similar to the system options in the main **entrée** system. For information about all the Options see the **entrée.NET Settings** chapter in this guide.

1. Click on the **Options** icon in the menu on the left.

2. **Option Descriptions** and **Current Setting** columns are displayed for each option.

3. Click in the **Current Setting** column to select the new setting from the drop down list.

4. Option changes will update automatically.

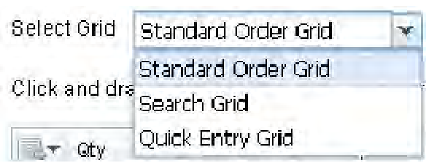
Customer Options

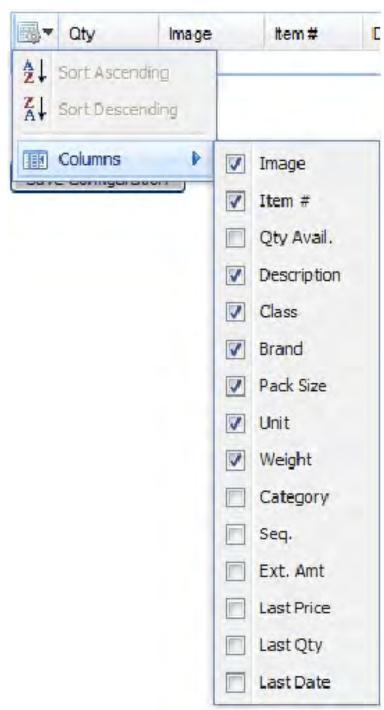
See the **entree.NET Settings** chapter **Options** section of this guide for the current **Promotions** and **Order Entry** options lists.

Grids

entrée.NET allows you to customize the display of column information in the Standard Order, Search and Quick Entry Grids for your customers.

Columns available for customer grids include: Item, Description, Class, Brand, Pack Size, Unit, Weight, Qty Avail., Category, Seq., Ext. Amt, Image, Last Price, Last Qty and Last Date.





1. Use the **Select Grid** drop down menu to choose the grid to customize.

2. Click and drag column names to reorder and move columns to their new locations.

3. Click the tools icon  to view the drop down menu to add or remove columns from the display.

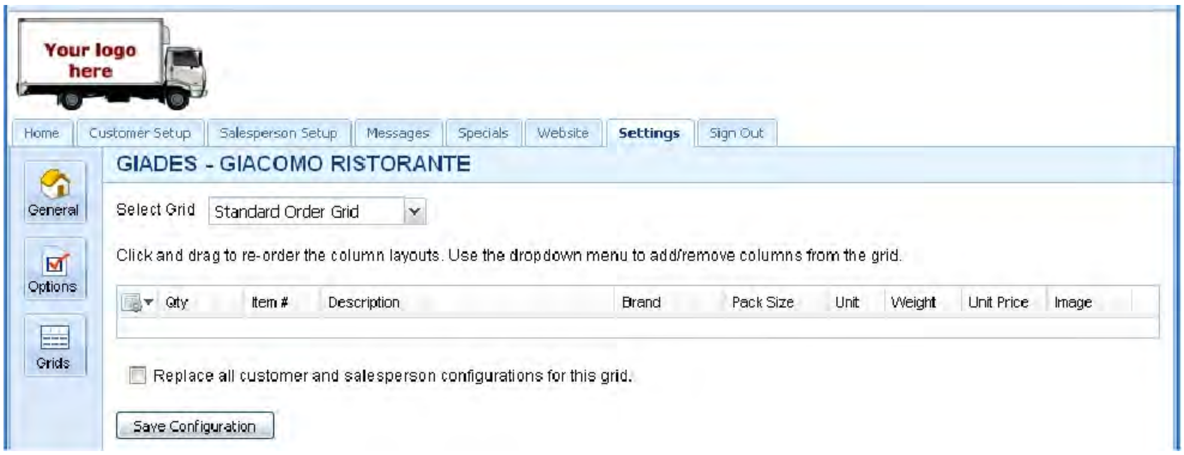
4. Check the box to add a column and remove the check to delete a column from the grid.

5. If you want to remove all the custom grids your customers and salespeople have defined, the click the box to "**Replace all customer and salesperson configurations for this grid.** " Leaving this box unchecked will only affect new customers and salespeople added after you save this configuration.

Caution It is advised that you **NOT CHECK** this box if your **entrée.NET** system has been in use for a while, as customers and salespeople will lose the grid settings they took time to customize.

6. When all your changes are complete click the **Save Configuration** button to save your changes.

Updating the grid configuration for a specific customer.



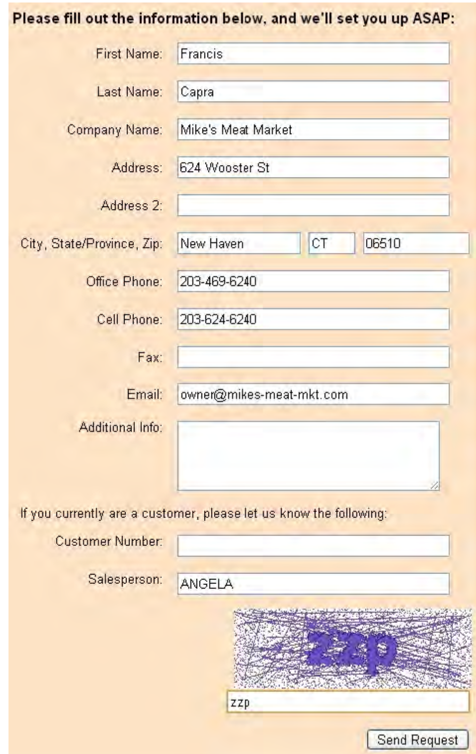
Customer Registration

If you have a website or the order entry login page on the internet for **entrée.NET** there will be a **Register** link in the customer login area. This link can be used by existing customers who would like to begin ordering online or for new customers wanting to place orders with you.

- Customers click the **Register** link and will be presented with an online registration form.
- Current customers will just fill in their customer number and Salesperson name, if applicable.
- New customers will provide all the contact information required for you to create their new account.

- When the customer hits **Send Request** an email is generated and sent to you containing all their registration information.

- Examples of a new customer request and a current customer request emails follow.

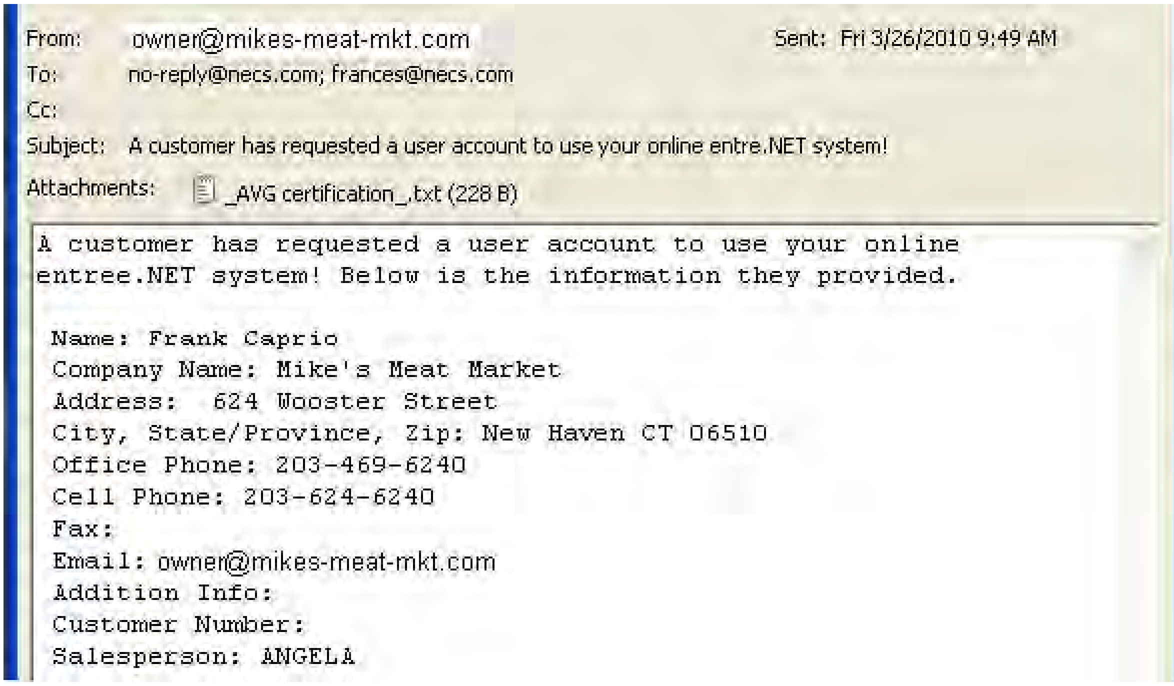


- Since current customers are already in the main **entrée** system, just follow the steps in the **Creating a Customer Account** section of this chapter to complete their request. As soon as they receive the automatically generated welcome email with their username and password they can begin ordering in **entrée.NET.**

- New customers need to have an account created in the main **entrée** system in **Customer File Maintenance** first. Then when you export to **entrée.NET** the new customer record will be listed in the **Customer Setup** tab. Finally follow the steps in the Creating a Customer Account section of this chapter to finish the process.

Email message samples

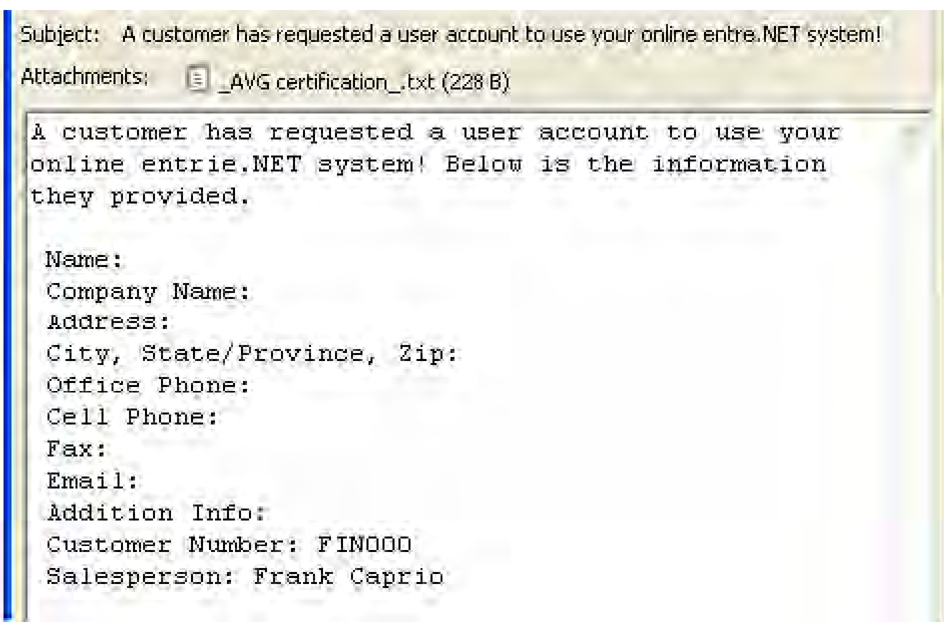
Example **A new customer requesting an account.**


From: owner@mikes-meat-mkt.com Sent: Fri 3/26/2010 9:49 AM
To: no-reply@necs.com; frances@necs.com
Cc:
Subject: A customer has requested a user account to use your online entre.NET system!
Attachments: _AVG certification_.txt (228 B)

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

Name: Frank Caprio
Company Name: Mike's Meat Market
Address: 624 Wooster Street
City, State/Province, Zip: New Haven CT 06510
Office Phone: 203-469-6240
Cell Phone: 203-624-6240
Fax:
Email: owner@mikes-meat-mkt.com
Addition Info:
Customer Number:
Salesperson: ANGELA

Example **Current customer requesting an account.**


Subject: A customer has requested a user account to use your online entre.NET system!
Attachments: _AVG certification_.txt (228 B)

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

Name:
Company Name:
Address:
City, State/Province, Zip:
Office Phone:
Cell Phone:
Fax:
Email:
Addition Info:
Customer Number: FIN000
Salesperson: Frank Caprio

Disabling a Customer Account

System Administrators have the ability to disable access to their **entrée.NET** system. Once an account has been disabled the Customer will no longer be able to login to **entrée.NET**.

1. Click on the **Customer Setup** tab.
2. Use the **Search** tool to find the customer.
3. Click the edit customer icon  to view the customer's account.
4. Click in the **Disable Account** check box.
5. Click the **Update Account** button.
6. A "**This account has been disabled**" pop-up message will display when a customer with a disabled account tries to login.

Removing Account Disable

Once an account has been disabled to allow access to **entrée.NET** again:

1. Remove the check mark from the **Disable Account** check box.
2. Click the **Update Account** button.
3. Now your customer will be able to login to **entrée.NET** and place orders again.

9.1 Restricted Items Feature

You can now define items to be "restricted" from **entrée.NET**, so that they will **not** appear to the customer when they are placing their order online, searching for items, etc.

You can also use this feature for situations such as a special order item, that you purchase for a specific customer (or group of customers), that your normal customer base is not allowed to order.

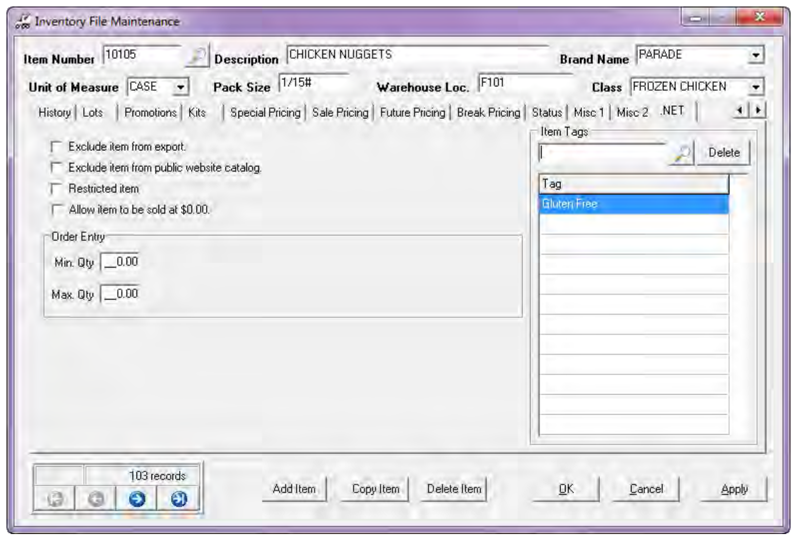
What makes this enhancement unique is that if the customer does have the item defined in the Customer Special Price/Standard Order file, they will still be allowed to purchase it, and it will be displayed to them when placing an online order.

entrée V4 SQL

1. Sign-in to **entrée V4 SQL**.
2. Go to the **Inventory** ribbon menu > **Inventory** option > find the item > select the **.NET Tab**.
3. Check the box for the "**Restricted item**" then click **Apply**.

entrée V3

1. Login to your main **entrée** system.
2. Use menu path: **File** > "**Inventory Maintenance**" > Then find the desired item.
3. Click the "**.NET**" tab for the item.
4. Check the box for "**Restricted item**" click **Apply**.



9.2 Item Promotions Feature

Setting up Item Promotions in entrée

The price calculation process has been updated to include support for item based promotions; "Class" based and volume discount promotions are still not supported.

This feature will also display the "**BUY n GET n FREE**" promotion if defined in the main **entrée** system - like **entrée** this is informational only in **entrée.NET** and does **not** adjust quantities on the order.

Support for **entrée** system option **#86** - "Disable promotions below Selling Price" and system option **#170** - "Disable promotions for customers receiving special or bid pricing" has been included and the current settings from **entrée** will automatically be applied in **entrée.NET**. (Requires **entrée** version 3.5.14+)

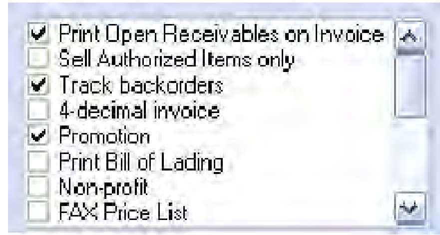
There is a three step process to enable the promotions for items and customers. First, promotions must be turned on / off for customers in the main **entrée** system. Customers can be updated as often as your business requires.

entrée V3

- **View / Update Promotions for a specific Customer**

1. Use menu path: **File** > **Customer Maintenance**.

2. Find the desired customer > then click the **Miscellaneous 1** tab.



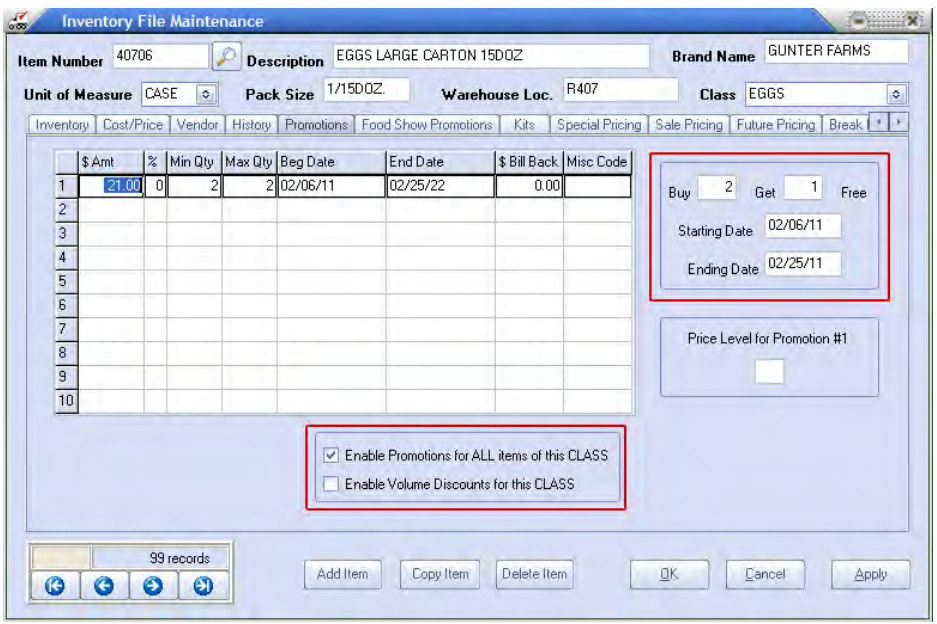
3. Scroll down the Options List to find "**Promotion**". Check the box to allow promotions for that customer. To turn off promotions remove the check.

4. Click **Apply**.

5. Repeat this process for all customers requiring an update for promotions.

- The second step in this process is to define the promotions for the desired items. See the Inventory File Maintenance **Promotions Tab** section of the **entrée KnowledgeBase** at **http://www.necs.com/knowledgebase/** for detailed information about setting up and using promotions and the **"BUY n GET n FREE"** promotion.

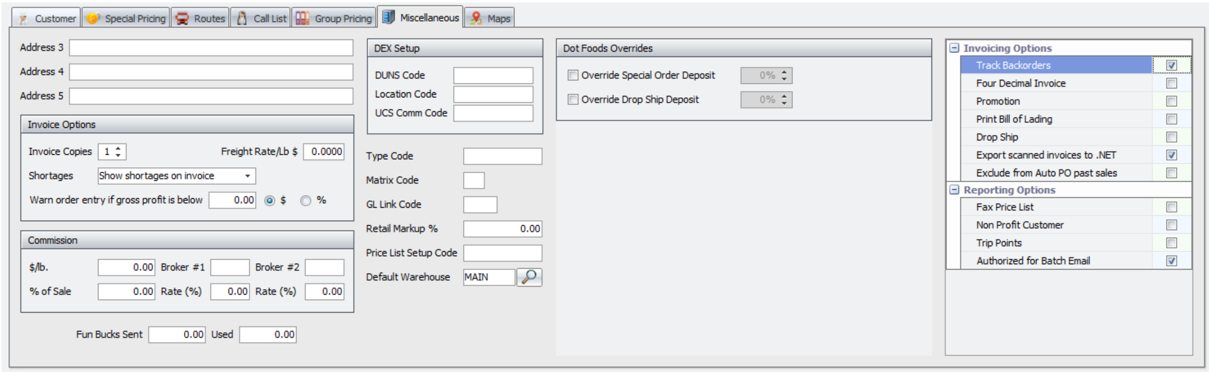
Example This is an **entrée V3** system **Promotions Tab** for eggs.



- The third and final step in this process is performed once your promotions are defined and the desired customers are updated for promotions in the main **entrée V3** system. You must now export to **entrée.NET** to update the system. Use menu path: **Invoicing** > **entrée.NET** > **Export to entrée.NET** > run a **Standard Update** to export updates to **entrée.NET**.

entrée V4 SQL

1. Sign-in to **entrée V4 SQL**.
2. Go to the **Customer** ribbon menu > **Customer** option **> find the customer >** select the **Miscellaneous Tab.**
3. Go to the **Invoicing Options** list on the right side.



- The second step in this process is to define the promotions for the desired items. Go to the **Inventory** ribbon **Inventory** option > find the item > click the **Promotions Tab**. For more detailed information about setting up promotions in **entrée** see the **entrée V4 SQL Knowledgebase** at http://www.necs.com/eV4SQL_KB/.

- For *step 3* in the export process for **entrée V4 SQL.** Go to the **Add-Ons** ribbon menu > **entrée.NET** option drop down menu > select **Export to entrée.NET.** See the **entrée.NET Scheduler** chapter for more detailed information about the export/import/update process.

entrée.NET Item Promotions Overview

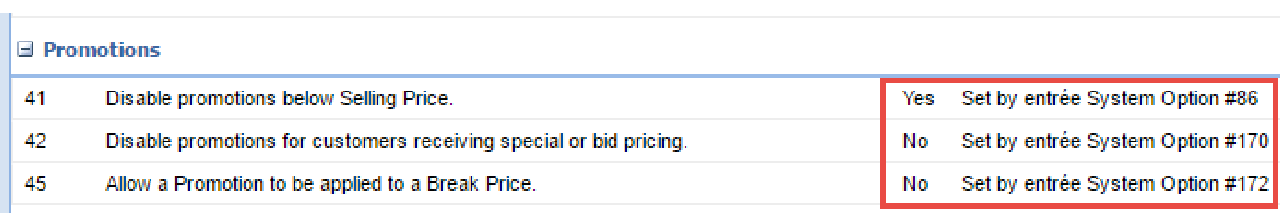
Information about an item's promotional pricing will be displayed beneath the item in the order entry grids in the same way that "Break Pricing" and "Sale Pricing" are currently shown. Here is an example of what your customer with promotions turned on will see in **entrée.NET** for a **promotion** item. The red tag indicates there is a special or promotion applied to the item.

To view Promotions settings for a specific customer in entrée.NET:

1. Click the **Customer Setup** tab > find the specific customer > click the **edit** icon  for the customer.

2. When the customer's information is displayed click on the **Options** button.

3. Scroll down to the **Promotions** section of the page. You will see the promotions options settings listed.



Note The **entrée.NET** promotions settings for customers are taken directly from **entrée Customer Maintenance** and are reset in **entrée.NET** whenever the **Export to entrée.NET** is run.

Chapter 10

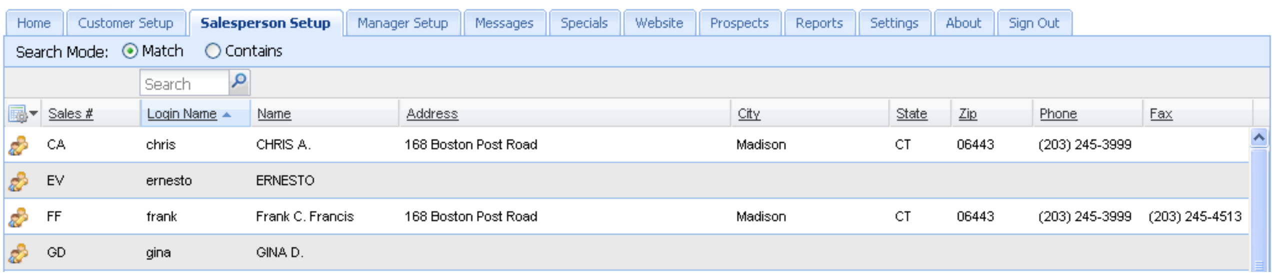
Salesperson Setup

10 Salesperson Setup

Your sales force can take full advantage of **entrée.NET** when managing their customer orders. They can access **entrée.NET** anywhere an Internet connection is available, whether from the office, at home or on the road.

Once a salesperson logs on, they are greeted with a bar graph that shows the breakdown of their sales on either a daily, weekly or yearly basis. If they are allowed access to Gross Profit information, this will be displayed on the graph as well. NECS plans to expand our “dashboard” tools and graphs to provide your sales force additional tools to monitor and drive sales.

- When you click on the **Salesperson Setup** tab your **entrée** salesperson file is displayed. You can sort the salesperson file using any of the underlined column headings in ascending or descending order. In the image below the salesperson file was sorted by **Login Name** to view all the salespersons that have access to **entrée.NET**.



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

- Column width can be modified by clicking and dragging the right or left column border in the headings section.

- Search for a specific salesperson by typing a word or letters in the Search box. Then select your **Search Mode** either Match or Contains. Click the search icon to get your search results.

- Click the edit salesperson icon to view the salesperson’s account information.

- To add new salespeople or update existing information use **Salesperson File Maintenance** in the main **entrée** system.

Creating a Salesperson Account

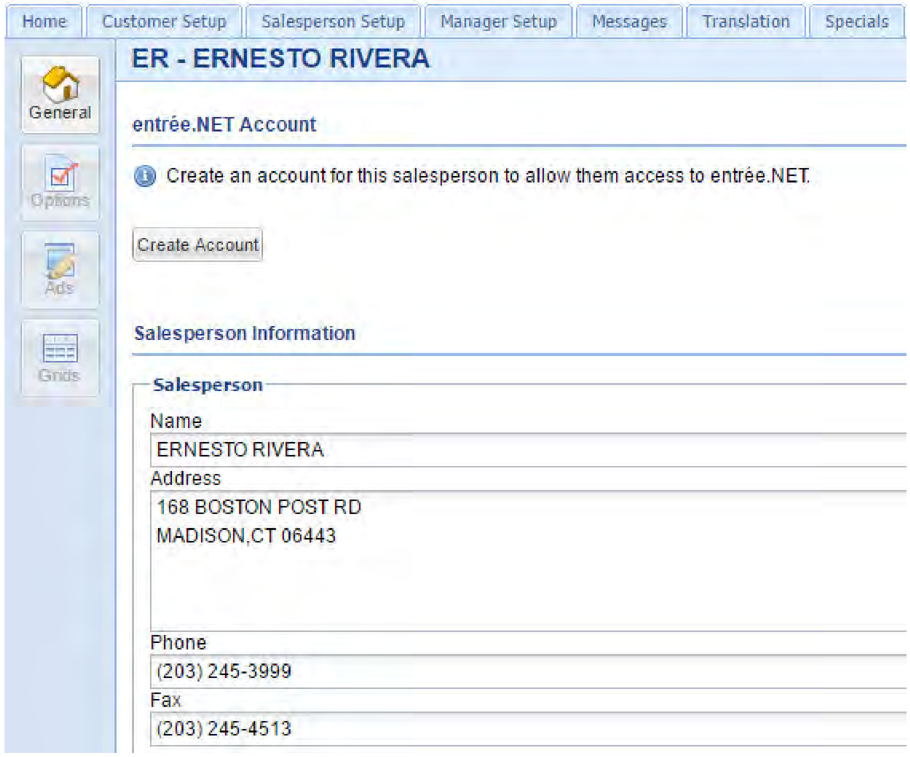
To give your sales force access to the **entrée.NET** system you will need to create accounts for each salesperson assigning them a username and initial password. Once they have this information your salespersons can sign in and manage their customer accounts. Follow these simple steps to create your salesperson accounts:

1. Click on the **Salesperson Setup** tab.

2. Use the **Search** tool to find the specific salesperson you need to give access to **entrée.NET.**

3. Click the edit salesperson icon to view the salesperson’s account information.

4. Click the **Create Account** button. 



Note

a. The **Salesperson Information** section is view only in **entrée.NET.**

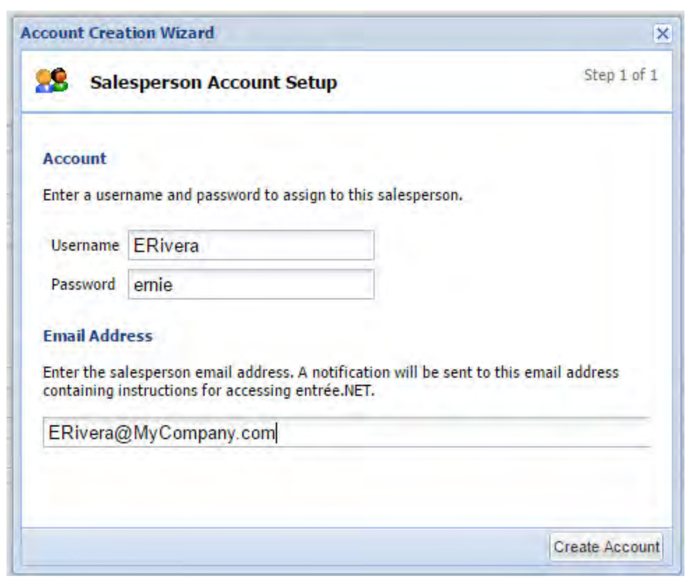
b. The account setup process will allow you to change an account **Username**. This authorization has also been provided to salespeople who have been given the ability to create accounts for customers.

5. The Account Creation Wizard displays the **Salesperson Account Setup** dialog box.

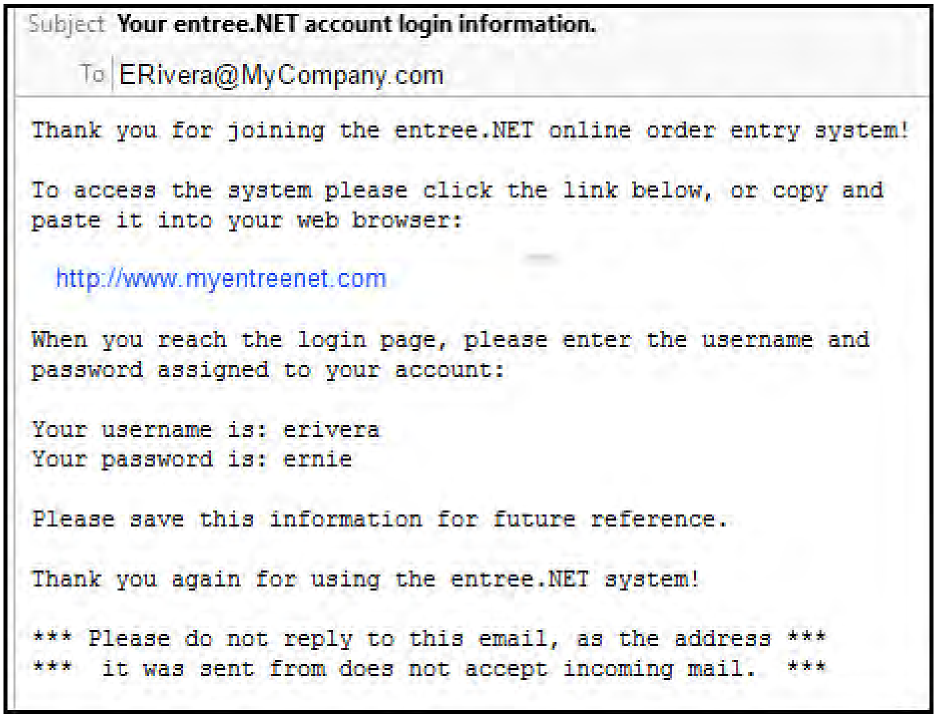
6. Enter a **Username** and **Password** for your salesperson in the Account section.

7. In the **Email Address** section enter the email address where your salesperson wants to receive their account setup information and emails.

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



9. Now your Salesperson Account Setup email will be automatically sent to your salesperson’s email address.



Subject Your entree.NET account login information.

To ERivera@MyCompany.com

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

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

http://www.myentreenet.com

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

Your username is: erivera
Your password is: ernie

Please save this information for future reference.

Thank you again for using the entree.NET system!

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

Forgotten Password

Your salespeople will have the ability to use an automated process to reset their password through your website. They will go to your website or login screen and enter their username in the password reset section.

This action will trigger an email sent to their account email address. This email will contain a temporary password and link to the password reset page.

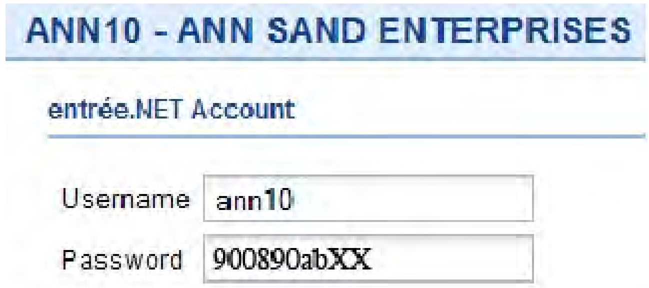
They will enter their username, temporary password and their new password here. If all the information has been entered correctly, their password will be reset in the **entrée.NET** system.

Website customer login area and **Forgot Password** link.

Login screen for distributors who do not have the entree.NET website module with the "Forgot Password" button.

Viewing / Resetting a Salesperson Password

There will be occasions when a salesperson has lost their password and the password reset procedure did not work for them for some reason. A new password storage system installed with **entrée.NET** release 3.2.1 will allow you to view customer and salesperson account passwords. The new system uses a key based encryption system to maintain a level of security but still allow for viewing the passwords.



Passwords will **NOT** be visible until they have been converted to the new storage format. A process has been put in place to convert the passwords as customers and salespeople login. So there will be some delay before all passwords are viewable.

Salespeople Options

The next step in account creation requires you to set the system options for your salespeople in **entrée.NET**. Your salespeople can view and enter orders for their assigned customers. They will see a list of their customers, and simply need to click on the customer they would like to work with.

- A feature of **entrée.NET** is the ability for a Salesperson to enable a new customer account. In the past, only the "Admin" (System Administrator) was allowed to create new customer accounts. Now your salespeople can setup their own customers with Usernames and Passwords, freeing your System Administrator to focus on other tasks. See the **Settings** chapter of this guide for complete information on this topic.
- Other pricing options include: modifying prices on customer orders and entering prices below minimum sell price.
- The new **Prospects** feature will give Salespeople the ability to provide prospective customers with price quotes on orders that can easily be converted to regular customer accounts later.
- The option to Display "Gross Profit" is used to control salesperson access to this information.

Updating Salespeople Options

1. Click the **Settings** tab
2. Click the **Options** icon in the menu on the left.
3. **Option Descriptions** and **Current Settings** columns are displayed for each option.
4. Click in the **Current Setting** column to select the new setting from the drop down list.
5. At the bottom of the page is the **Salespeople** option section (shown in the image below).
6. Changes to **Options** will update automatically.

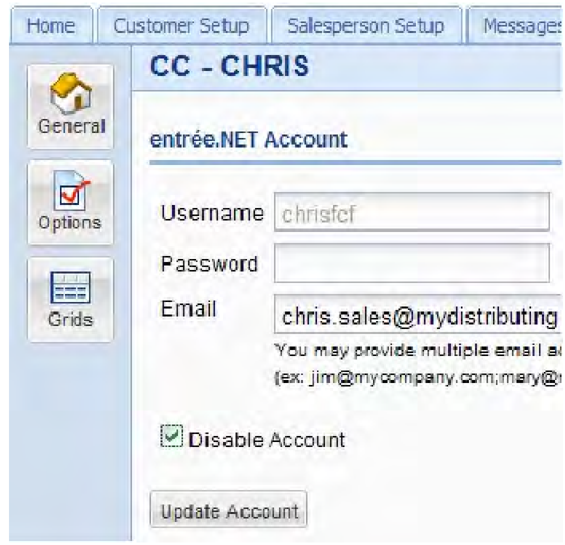
Set Options for Salespeople

- See the **entree.NET Settings** chapter **Options** section of this guide for the current options list and explanations.

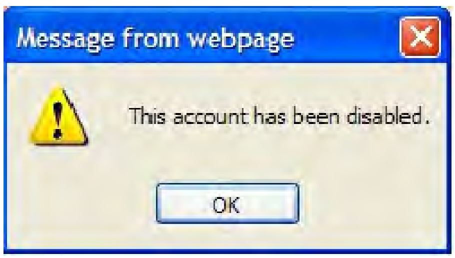
- See the **entrée Options** section for a complete explanation of how to use the new **Salesperson / Broker File Maintenance Remote Order Entry** options for salespeople.

Disabling an Account

System Administrators have the ability to disable access to their **entrée.NET** system. Once an account has been disabled the Salesperson will no longer be able to login to e**ntrée.NET**.



1. Click on the **Salesperson Setup** tab.
2. Use the **Search** tool to find the salesperson.
3. Click the edit salesperson icon  to view the salesperson's account.
4. Click in the **Disable Account** check box.
5. Click the **Update Account** button.
6. This pop-up message box will display when a salesperson with a disabled account tries to login.



Turning On a Disabled Account

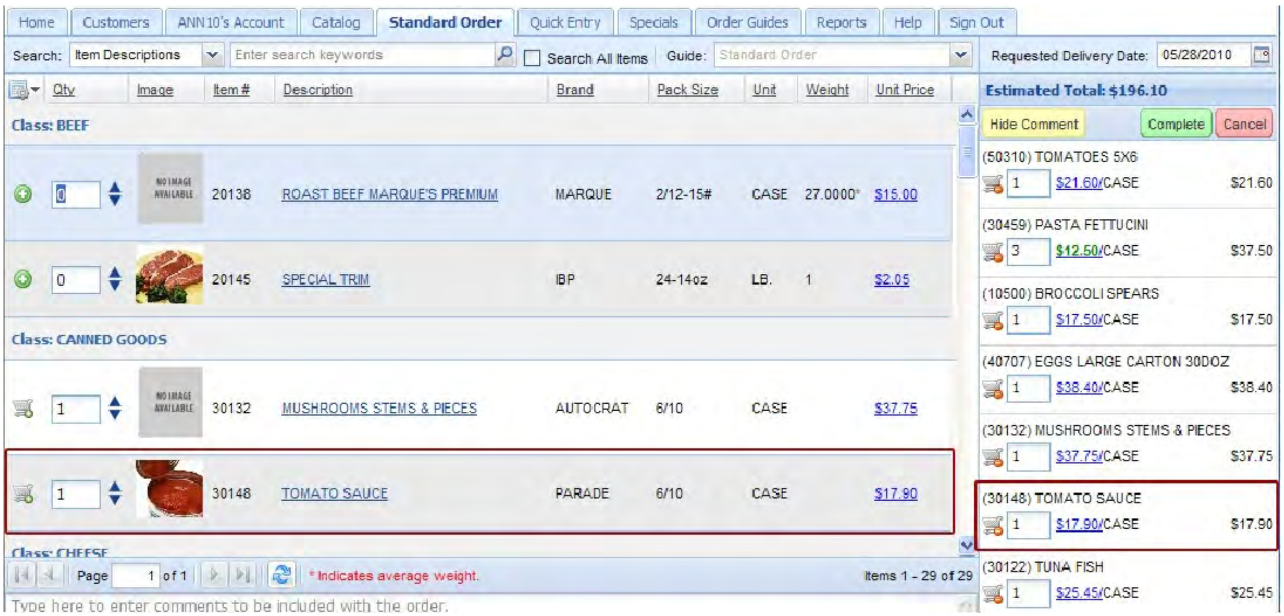
Once an account has been disabled to allow access to **entrée.NET** again:

1. Click on the **Salesperson Setup** tab.
2. Use the **Search** tool to find the salesperson with the disabled account.
3. Click the edit salesperson icon  to view the salesperson's account.
4. Remove the check mark from the **Disable Account** check box.
5. Click the **Update Account** button.

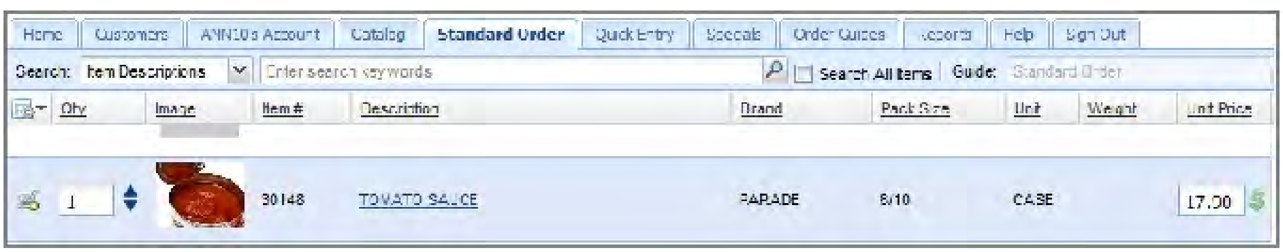
The Salesperson Price Modification Option

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

1. The Salesperson must have the **Allow salesperson to modify pricing** option set to **Yes**.
2. Items must be in an open order or in the shopping cart to modify their prices and view the **Item Price Information**.



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



4. Clicking on the green dollar sign triggers the display of the **Item Price Information**. All the pricing information your salespeople need for that item will be presented so they can make an informed pricing decision.
5. Salespeople can then edit the item's price and click off the price field to exit the edit price dialog.
6. The price change will automatically be saved in the open order and in the shopping cart. The price will now be displayed in green indicating that the price has been changed.

Price Modifications Using % and Base Cost

If you have the "**Allow salesperson to adjust prices by specifying a percentage over "Base Cost"** option set to "**Yes**", then you will see the **%** and **Base Cost** columns in your item details as shown in the image below. You can adjust prices by entering a percentage of base cost. The price calculation will follow the rules defined for the "**Customer Special Price Formula**" in the **Pricing Setup** tab. In **entrée V3** go to **System** > **Preferences** and in **entrée V4 SQL** go to the **System** ribbon menu > select the **System Preferences** option.

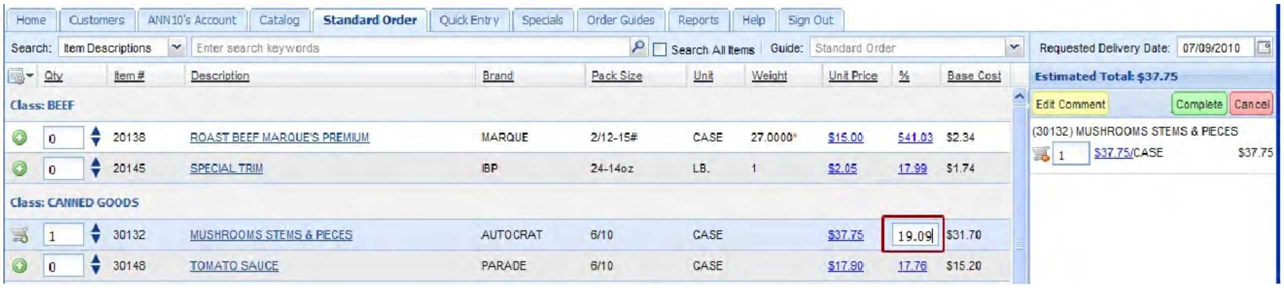
Note These calculations are made using the values available to **entrée.NET** at the time the order is placed and will only lock the price on the invoice. If any cost changes take place in **entrée** as a result of receiving new product or a manual cost change there is no guarantee that the margins used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

Qty	Item #	Description	Brand	Pack Size	Unit	Weight	Unit Price	%	Base Cost
Class: BEEF									
0	20138	ROAST BEEF MARQUE'S PREMIUM	MARQUE	2/12-15#	CASE	27.0000*	$15.00	541.03	$2.34
0	20145	SPECIAL TRIM	IBP	24-14oz	LB.	1	$2.05	17.99	$1.74
Class: CANNED GOODS									
0	30132	MUSHROOMS STEMS & PIECES	AUTOCRAT	6/10	CASE		$37.75	19.09	$31.70
0	30148	TOMATO SAUCE	PARADE	6/10	CASE		$17.90	17.76	$15.20
Class: CHEESE									
0	40122	CHEESE FANCY SHRED CHEDDAR	SCHREIBER	4/5	CASE	20.0000	$1.80	16.10	$1.55
Class: CLEANERS									
0	70171	BLEACH	PARADE	6/1GAL	CASE		$6.25	17.84	$5.30
0	70196	STAINLESS STEEL CLEANER	PARADE	6/18 OZ	CASE		$19.80	17.50	$16.85
Class: DRESSINGS									
0	30206	MAYONNAISE PARADE H.D.	PARADE	4/1GAL	CASE		$14.40	17.55	$12.25
Class: EGGS									
0	40707	EGGS LARGE CARTON 30DOZ	GUNTER FARMS	1/30DOZ.	CASE		$38.40	17.65	$32.64
Class: FRENCH FRIES									
0	10338	FRIES STEAK CUT	MC CAIN	6/5#	CASE		$14.34	19.50	$12.00

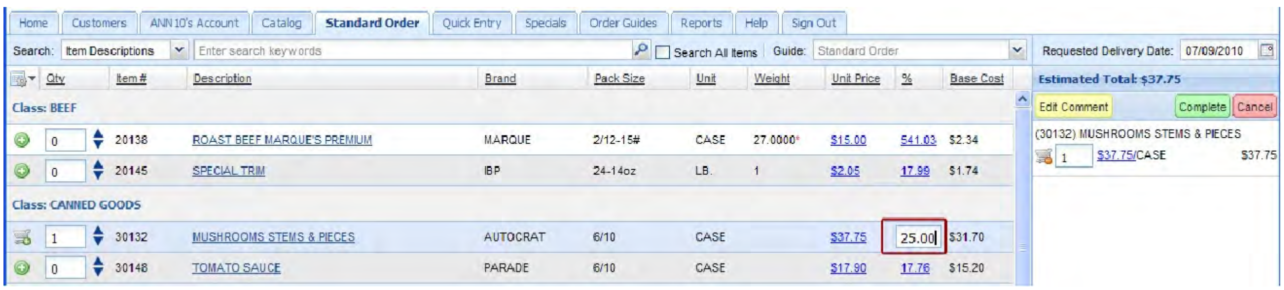
Editing Prices Using % Column

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

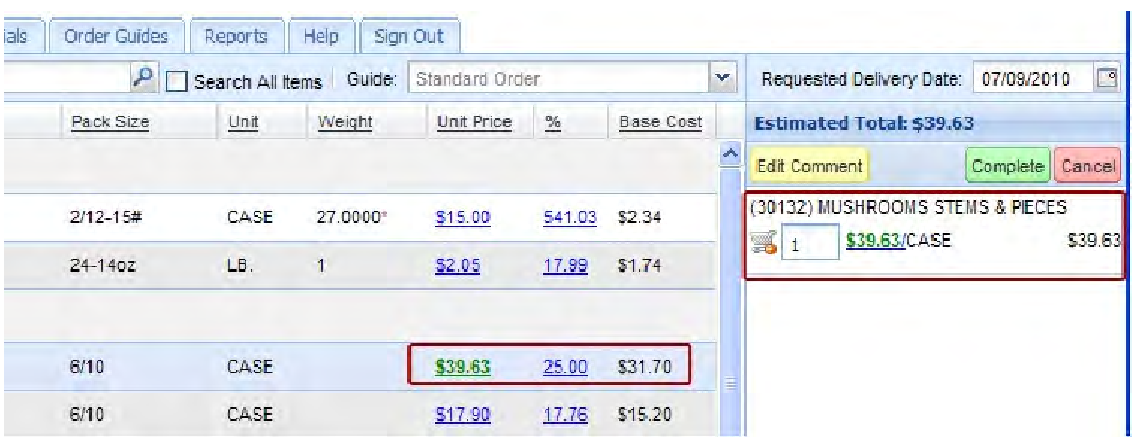
2. Click in the **%** column for the desired item and the edit percentage dialog box displays.



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



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



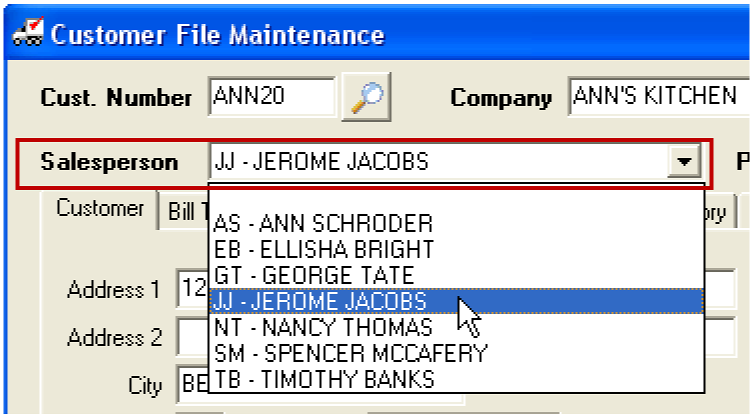
10.1 Call List Setup

Setting up the entrée.NET Salesperson Call List in entrée

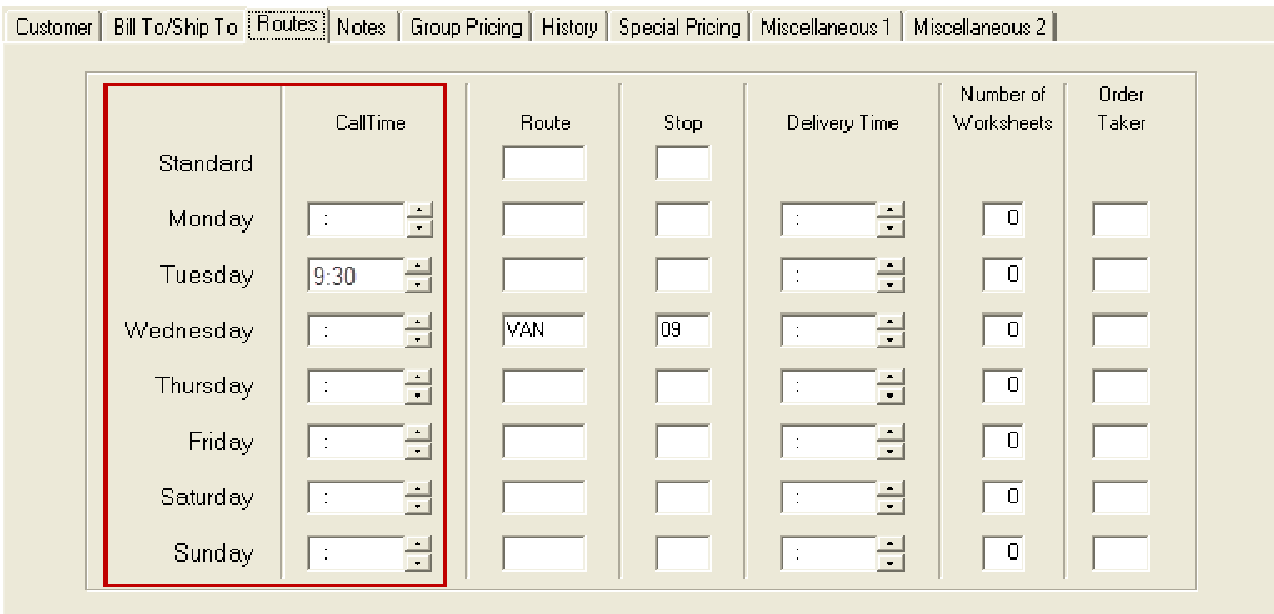
Manage the daily call lists displayed when members of your sales force login to **entrée.NET**. The Call List feature will display a list of customers and scheduled call times for the day. Follow these steps to setup your salesperson call lists in the **Customer File** in **entrée**:

entrée V3

1. Go to the **File** menu into **Customer File Maintenance** and find the customer.
2. Then on the **Customer** tab assign a salesperson to the customer using the **Salesperson** drop down menu.



3. Then in the **Routes** tab enter the **Call Time** for the desired day.



4. Click **Add** then **OK** to save the changes in Customer File Maintenance. Update all the customers you want added to DSR call lists.

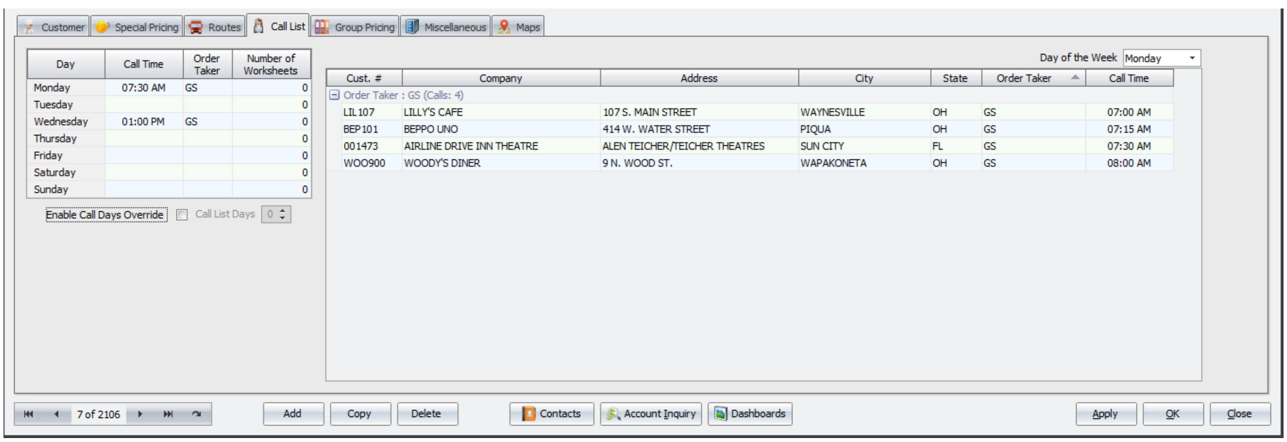
5. The updated customer information will be sent to **entrée.NET** the next time the **entrée.NET Scheduler** runs the **Export to entrée.NET** or you can manually run the **Export to entrée.NET** through the Invoicing menu in **entrée**.

6. When a salesperson logs into **entrée.NET** they will find their customer **Call List** for that day on the **Home** tab.

entrée V4 SQL

The **Customer Call List Tab** is used to predefine the customer's call schedule and assigned an Order Taker.

1. Go to the **Customer** ribbon menu and select the **Customer** option.
2. Find the desired customer and click the **Call List Tab**.
3. Click in the **Call Time** box for the desired days and use the time menu to set your call time.
    - Select the best time to call the customer, for each day of the week that they are normally called for an order.
    - The call time information is primarily used with the Call Sheet Report and the Order Taker Call List feature of the entrée V4 Invoicing system.
4. Click in the **Order Taker** box for that same day and enter the order taker code assigned.
    - The Order Taker code field is used in conjunction with the **Call List** button in the **Create Invoice** screen of **entrée V4**.
    - Enter the 2-digit code representing the order taker responsible for this customer in this field.
    - Only enter the order taker codes for the days of the week that a call time has also been defined.
5. Click in the **Number of Worksheets** box and adjust the number.
6. Click **Add** to save your call list entries for the customer.



Company Call List Grid

On the right side of the **Call List Tab** is the Company Call List Grid. This grid shows the company call list and order takers for each day of the week when you select the day in the **Day of the Week** menu above.

- Click the **Day of the Week** drop down menu and select a day of the week to view all the calls by Order Taker code for that day of the week.

Override Options

- **Enable Call Days Override -** Check this option to enable the Call List Days option.

- **Call List Days -** When the Enable Call Days Override option is checked you can set the number of call list days for the customer.

Using the Call List Feature

Manage your customer calls using the **Call List** feature. The System Administrator will update customer files to assign salespeople to customers and set call times. See the **Call List Setup** section earlier in this chapter for information.

The .NET Salesperson's View:

When a salesperson logs into **entrée.NET** they will find their customer **Call List** for that day on the **Home** tab.

Load Customer icon  is used to view the customer's account information.

Call Time column shows the scheduled call time from the customer file in **entrée**.

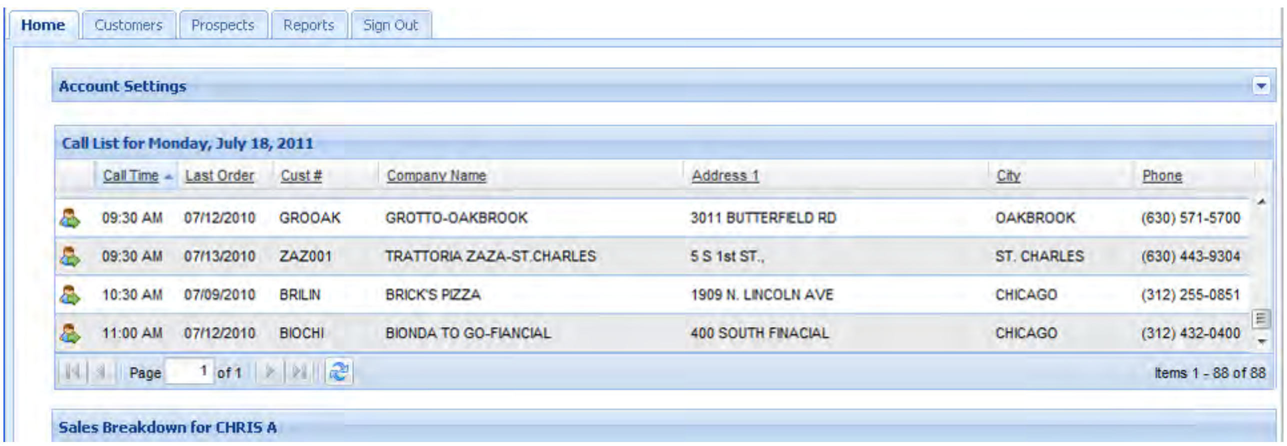
Last Order column shows date of the last order.

Cust # column shows the Customer number from **entrée**.

Company Name column shows company name.

Address 1 City column shows the street address.

Phone column shows the phone number.



Chapter 11

Message Setup

11 Message Setup

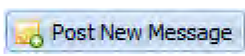
Staying in close contact with your customers and salespeople is important in today's fast paced business world. With the messaging system built into **entrée.NET**, you can easily stay in touch with messages that will appear on the user's home page as soon as they log in to the system. Messages can optionally be emailed to recipients using the email addresses from your customer and sales account information.

- Click on the **Messages** tab.

- Your previously posted messages are listed here starting with the Edit Message  and Delete Message  tools, followed by **Subject**, **Message** text and **Posted** date and time.

Posting New Messages & Emails

1. Click on the **Messages** tab.

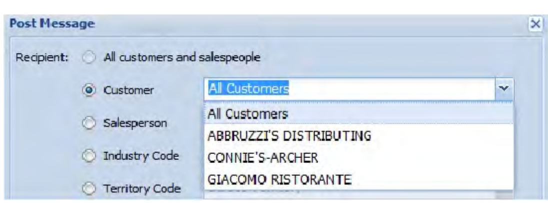
2. Click the  button and the **Post Message** dialog box displays.

3. **Recipient:** Click the button to select the recipients of the new message.

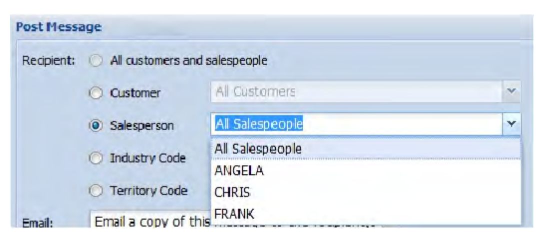
4. Use the drop down lists for each **Recipient** category to select individual businesses and salespeople to receive your message.

5. Multiple recipient options are available including Industry Codes and Territory. If you have this data set up in your main **entrée** system these recipient options will be available to you here**.**

The Recipient Customer drop down list is used to select a specific customer for the message.



The Recipient Salesperson drop down list is used to select individual salespeople for the message.

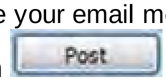


6. **Email:** Use the email drop down list to make your selection. The default email option is “**Do not email recipient**”.

   Your other option is “**Email a copy of this message to the recipient(s)**”. This option will send two communications to your recipients a system message and an email.

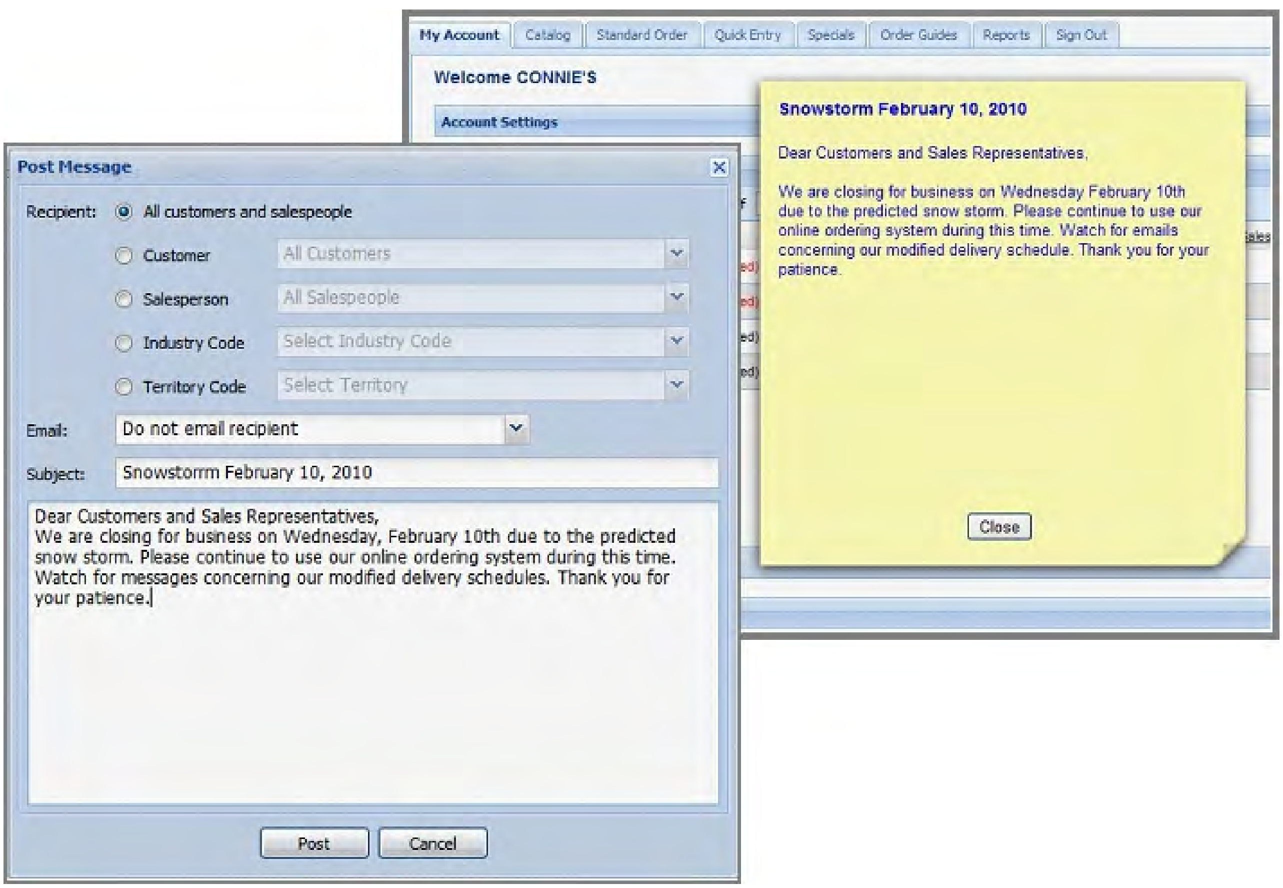
7. **Subject:** Type a short description about the subject of your email.

8. **Message:** Below the **Subject** is the area where you will type your email message.

9. Once your message has been entered, click the **Post** button  to send your message to the recipients.
10. If you decide not to send the message, click the **Cancel** button.

11. The message has been sent and will post on your customer’s **My Account** page. When the customer logs in to the system your message is the first thing they see.

Left image: The Post Message dialog box before you post the message.
Right image: The customer’s message posted on their My Account page after they log in.



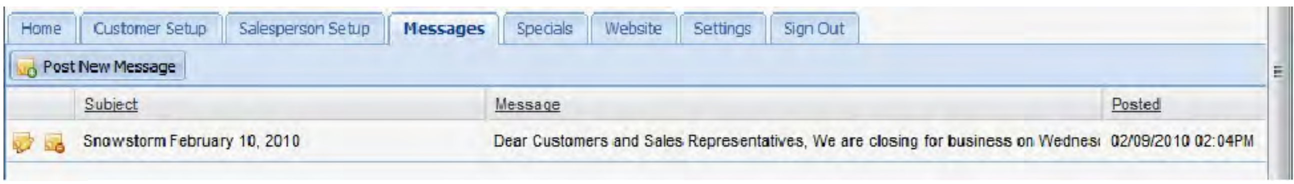
Managing Posted Messages

- **Delete Message** tool click this to remove unwanted messages from the posted messages list. The **Delete Message?** dialog box displays then click **Yes.**

- **Edit Message** tool is used to edit previously posted messages. There may be some messages that you frequently send to your customers. You can save time by editing and reposting these frequently used messages from your posted messages list. An example would be messages relating to holiday hours and order cut off times.

How the Edit Message tool Works with Posted Messages

1. Select a message from the posted messages list and click **Edit Message**.



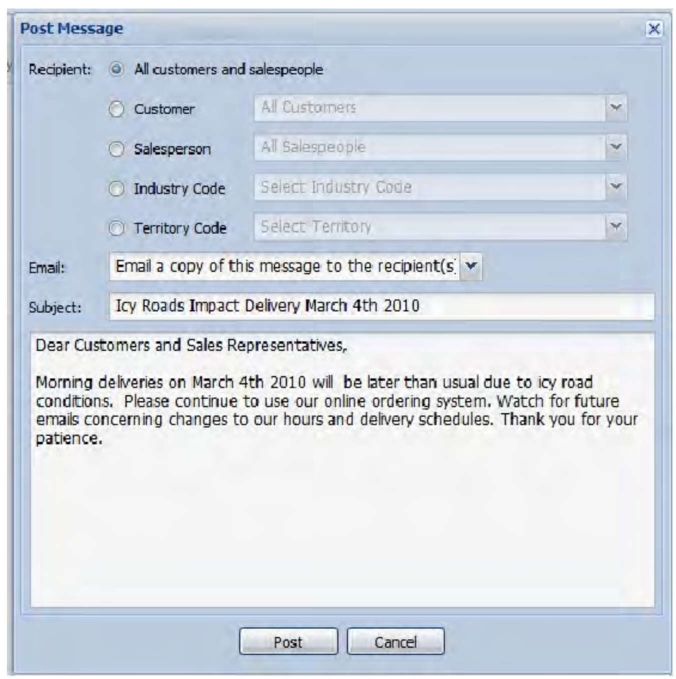
2. The **Post Message** dialog box displays the details of that message.

3. Modify the information in the old message to create your new message. Be sure to change recipients, dates and times in the message to fit the new message's details.

4. Click the **Post** button to send your new edited message to the recipients.

5. The **Email Message?** pop-up box will display:

   "**Will no longer be able to edit this message once it has been emailed. Save and Email?"**



6. Click **Yes** to save and email the new message.

7. The newly posted message has now replaced the posted email message you edited in the list.

8. The new posted message has now replaced the previous message in the posted messages list.

Chapter 12

Translation Tab

12 Translation Tab

What is the entrée.NET Language Translator Service?

Our new Language Translator Service will automatically translate all your **Class Names, Item Description line 1**, **Item Description line 2** and **Item Notes** into your choice of over 50 of the most popular languages. Having language translations in **entrée.NET** allows customers entering orders online to view your catalog in their native language.

Activating the Language Translator Service

Once you run the activation process the Language Translator license allows you to select two languages for use in **entrée.NET**. You will be billed $50 monthly for the service as long as it is activated. To view examples of the translated catalog visit the **Translation Examples** section of this chapter.

Translation Data Refresh

Periodically the translation process will have to be rerun for the languages you have selected to add any new items from your catalog and update item Descriptions, Classes and Notes. This topic is covered in detail in a section of this chapter.

Note The translation process will not be perfect and some English words may not be changed on the screen.

Translator Service Cancellation

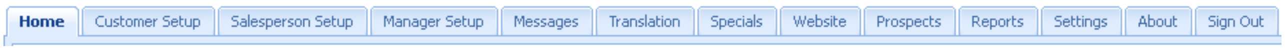
You can easily cancel the Language Translator Service whenever you like. An email will be sent to cancel your service and **entrée.NET** will automatically deactivate the language translator features.

Reminder: You can re-activate the Language Translator Service at any time.

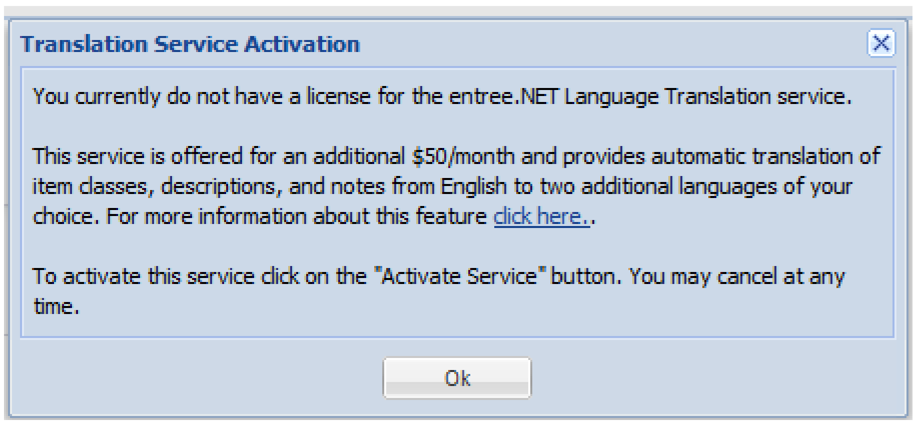
12.1 Activating the Language Translator Service

1. To activate the Language Translator Service the System Administrator must login to **entrée.NET**.

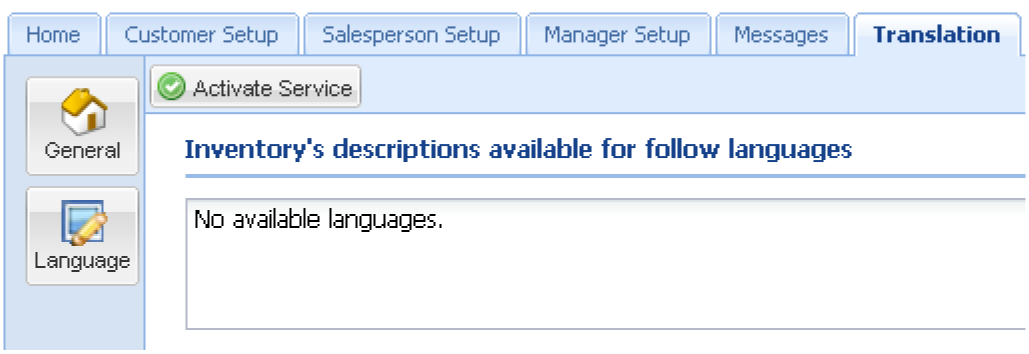
2. Click the new **Translation** tab that will be in the **entrée.NET** main menu.



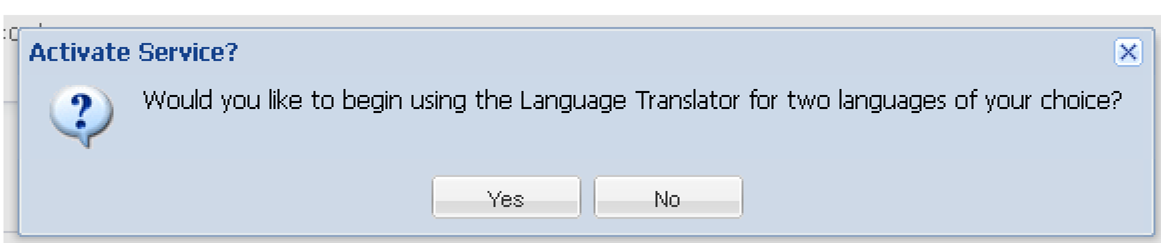
3. When you first click the **Translation** tab a message box will display explaining the Language Translator Service and the monthly fee. Click **OK** to close the Information box.



4. Click the **Activate Service** button on the **Translation tab** to begin the activation process.



5. The **Activate Service?** dialog box will display. Respond **Yes** to activate the Language Translator service.

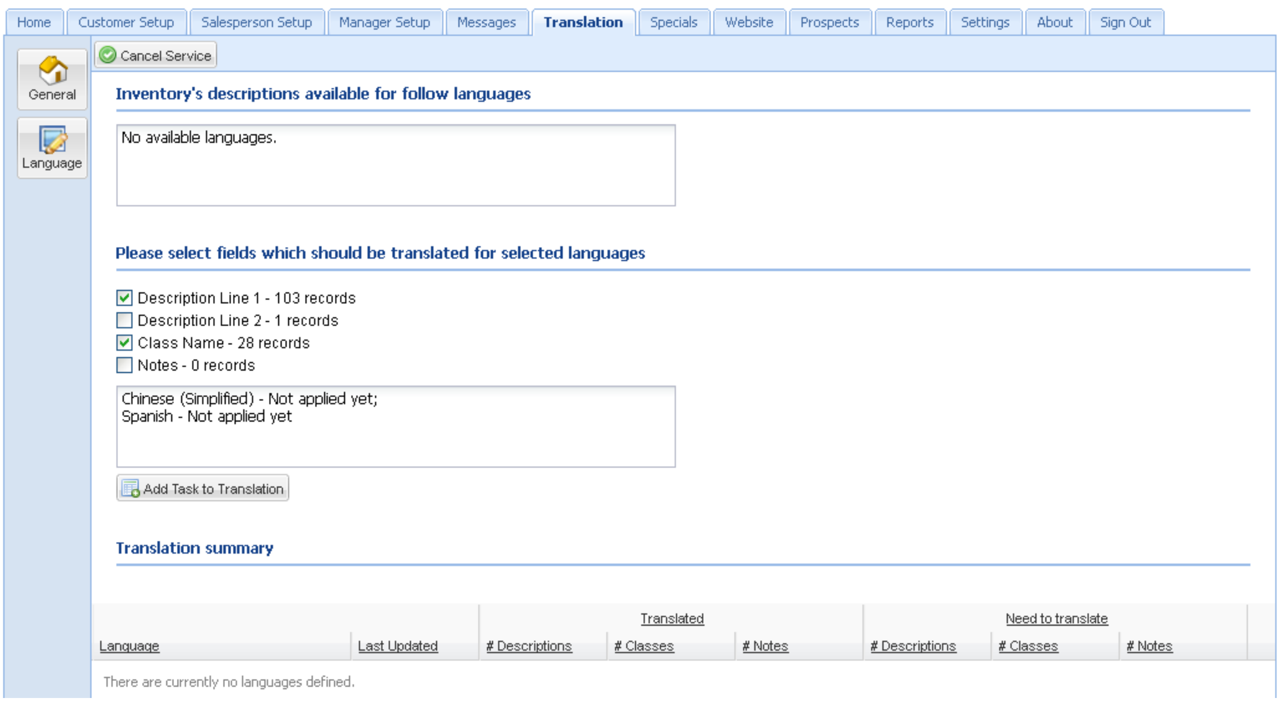


NECS will immediately have the Language Translator service available in entrée.NET. An email notification will be sent to you to confirm activation of the Language Translator service and the monthly fees involved.

6. Next click the **Language** button on the left to open the language selection screen which lists the available languages.

7. Check the box for the one or two languages to select them. Your Translator Service license limits you to **two** languages.

8. Now click the **General** button. The languages you selected are listed in the selected languages box in the center of the screen with a status of "**Not applied yet**".



9. Now you will check the boxes for the fields you would like to be translated into your chosen languages. In this section the number of records that will be translated for each field in your database is displayed.

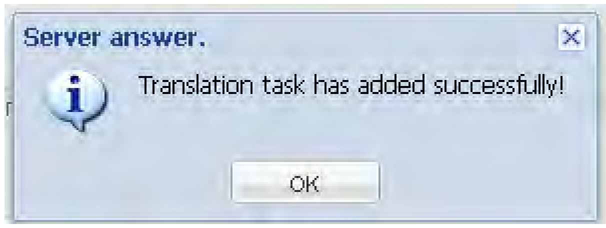
Fields to select from are:

- **Description Line 1**
- **Description Line 2**
- **Class Name**
- **Notes**

Note The information in these fields comes from the main **entrée** system. So when the information in **entrée** changes and is exported to **entrée.NET** you will need to run this translation process again for your selected languages to convert the new data.

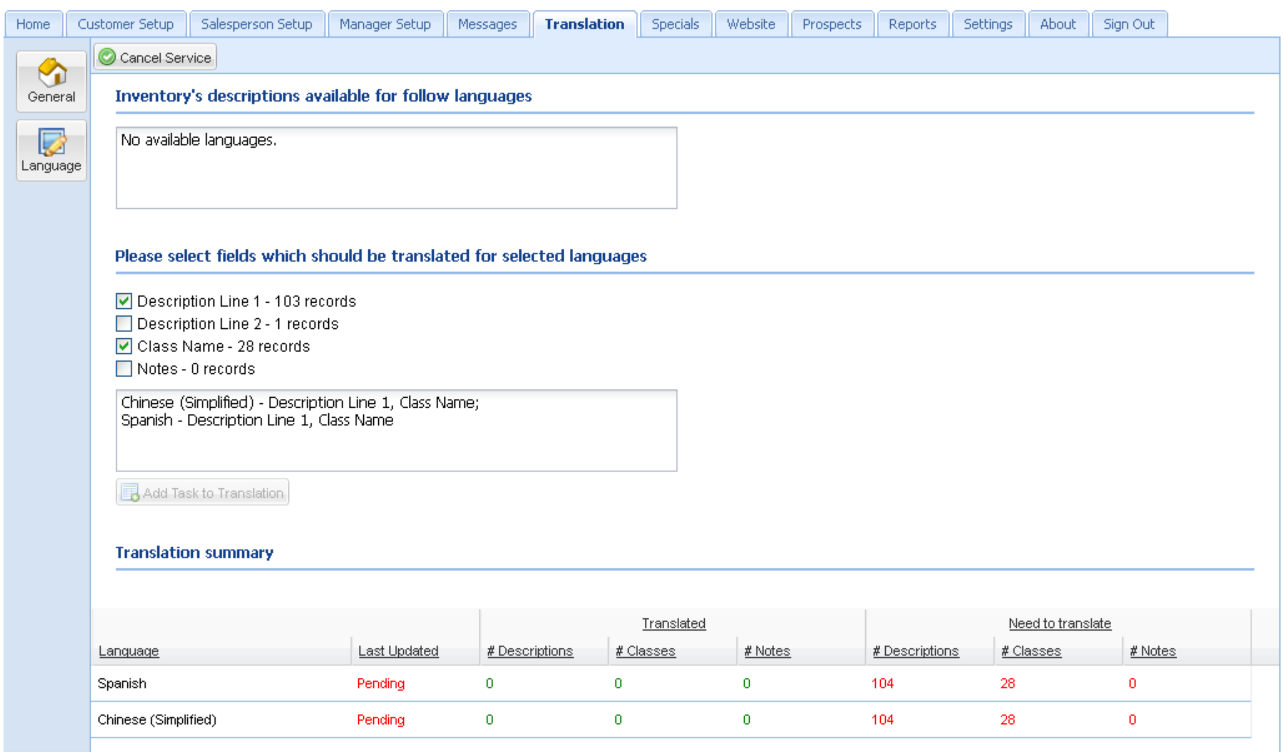
10. Once your fields are selected you will run the translation process by clicking the **Add Task to Translation** button.

11. Once you click the **Add Task to Translation** button the **Server answer** message box will be displayed.



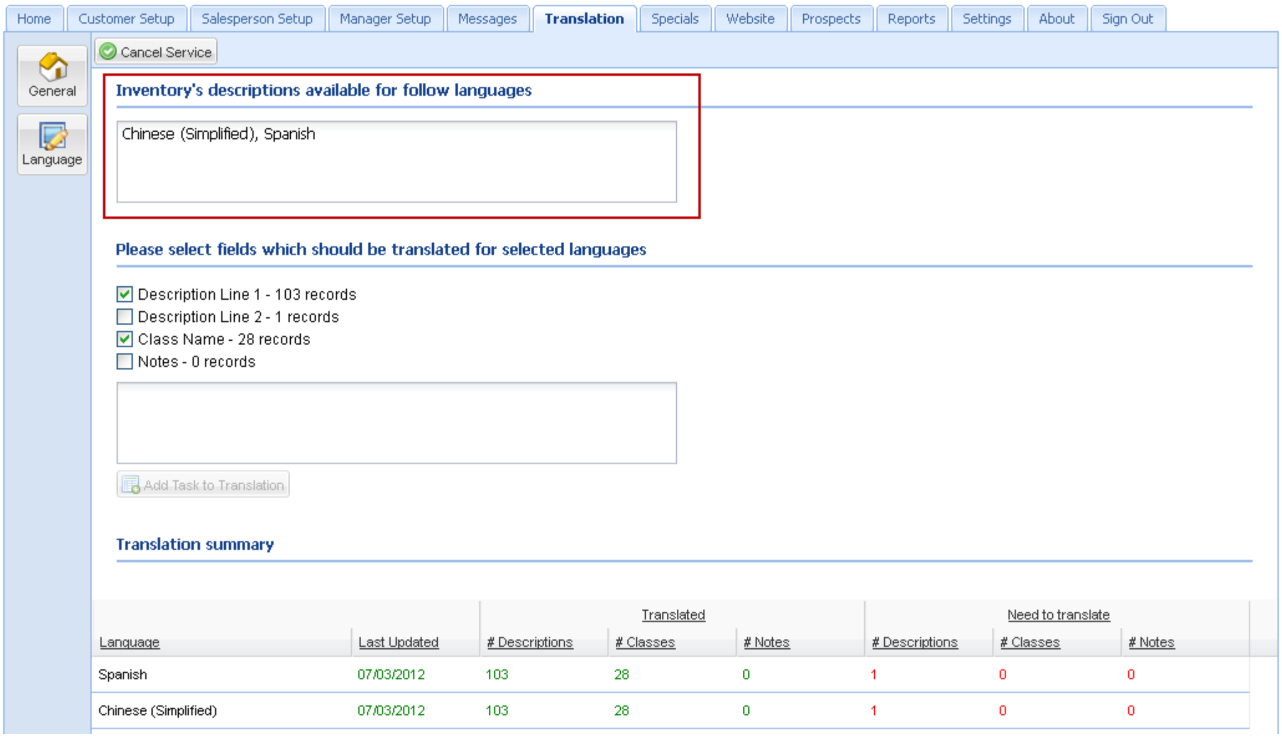
12. Click **OK** to run the language translation process. Translating and loading the fields you have selected should take about 5 minutes or less depending on how much data must be translated.

13. While the language translation process is running look in the **Translation Summary** section of the screen and you will see that the value of the **Last Updated** field for the selected languages will be **Pending**.



The number of Descriptions, Classes and Notes that need to be translated will be shown in the **Need to Translate** area in **red** text.

14. Once the process has completed the **Translation Summary** section **Translated** area will show how many fields were successfully translated for each language in **green** text. The **Last Updated** field will display the date of the translation.



15. When the translation of your fields is done the **Inventory's descriptions available for the following languages** section at the top of the screen will list the languages available. In our example we have Chinese (Simplified) and Spanish. (see image above).

12.2 Translation Data Refresh

Periodically the translation process will have to be rerun for the languages you have selected to refresh new data. Any new items, modifications to item notes, descriptions or classes that are imported from the main **entrée** system will need to be translated. The process to update the translations in your catalog for this newly imported data follows.

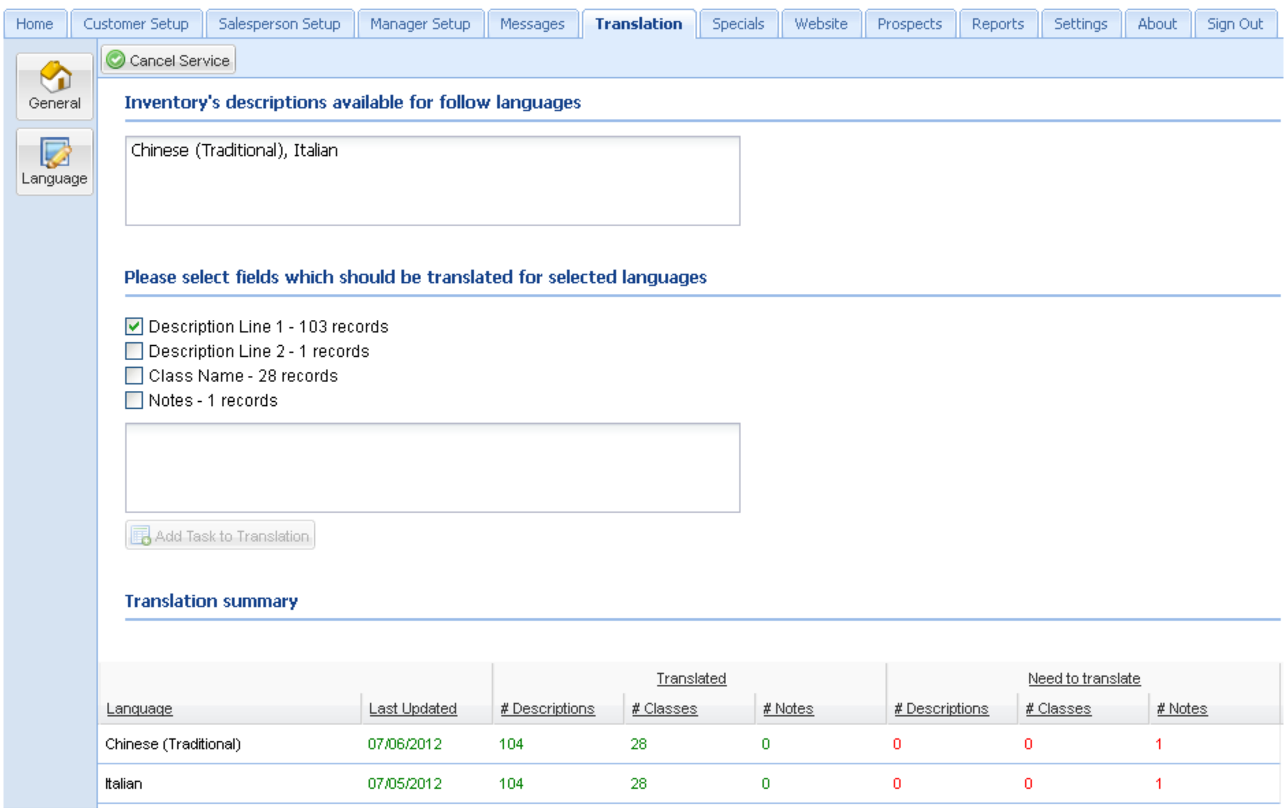
Note You are not allowed to change the languages you previously selected for translation.

- If you have only one language selected, you can add your second language at this time.
- If you have two languages you must refresh the data using those same two languages.

The Translation Data Refresh Process

1. When you first open the **Translation** tab you will see:

- The languages available listed in your system in the **Inventory's descriptions available for the following languages** section at the top.
- The **Translation Summary** section **Translated** area will show in **green** text how many fields were translated for each language the last time the translation was run.
- The **Last Updated** field displays the date of the last translation of your data.

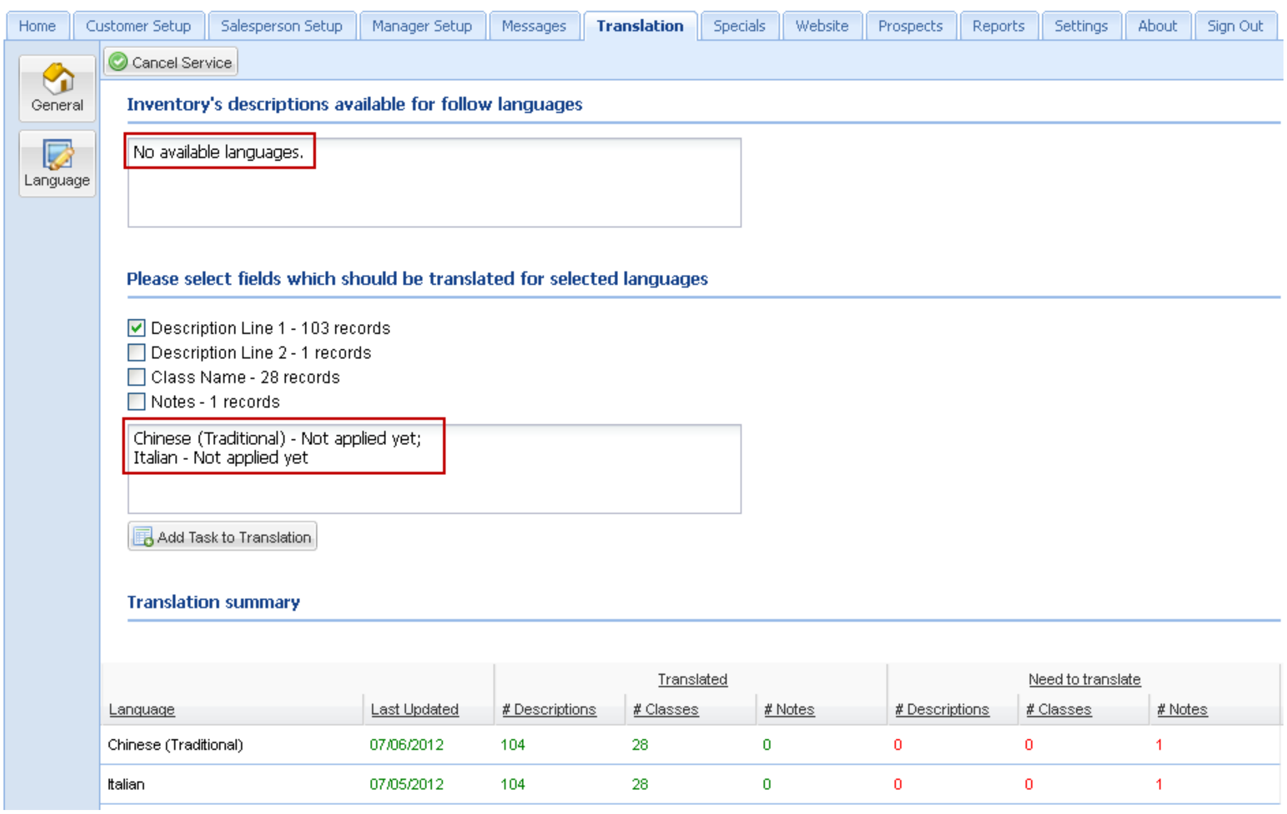


2. Click the **Language** button on the left to open the language selection screen. You must **un-check** then **re-check** the same languages you translated before to re-select them.

Reminder: You must choose the same languages or you can add a second at this time.

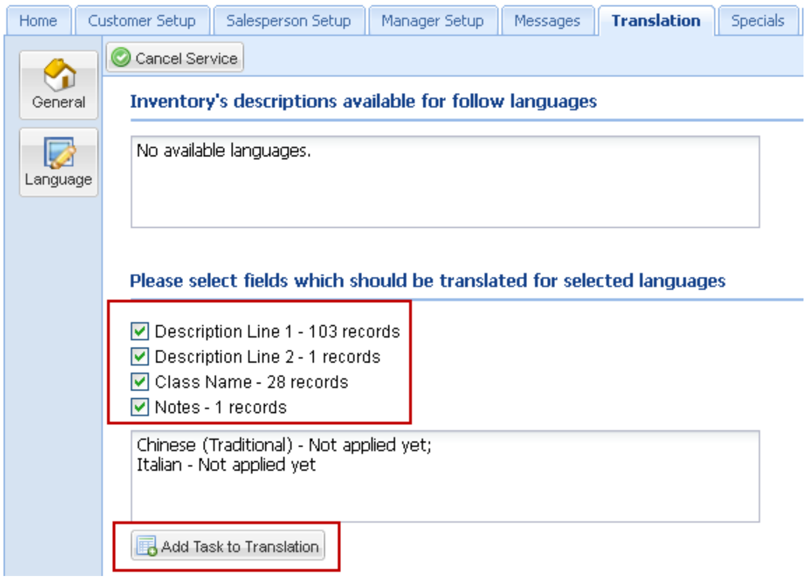
3. Click the **General** button and you will see:

- **Inventory's descriptions available for the following languages** section at the top says "**No available languages**".
- Your languages are listed in the selected languages box in the center of the screen with a status of "**Not applied yet**".
- The **Add Task to Translation** button has been activated.
- The number of new Descriptions, Classes and Notes to be translated during the refresh process are shown in the **Need to Translate** area in **red** text.



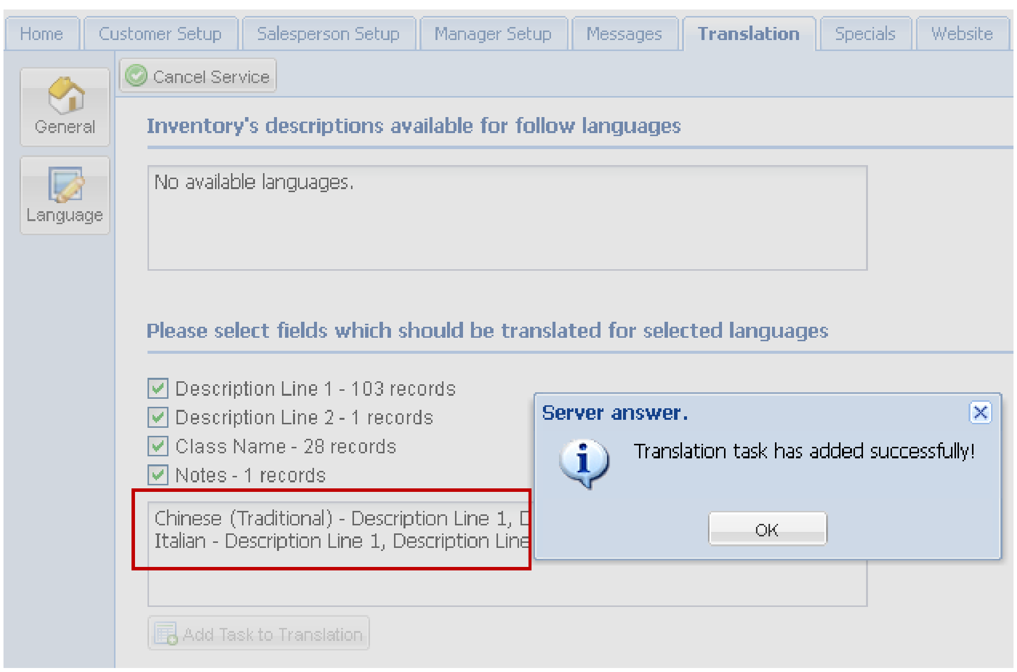
4. Now check the boxes to select the fields to be translated in the **Please select fields which should be translated for selected languages** section.

5. Click the **Add Task to Translation** button to start the data translation process.



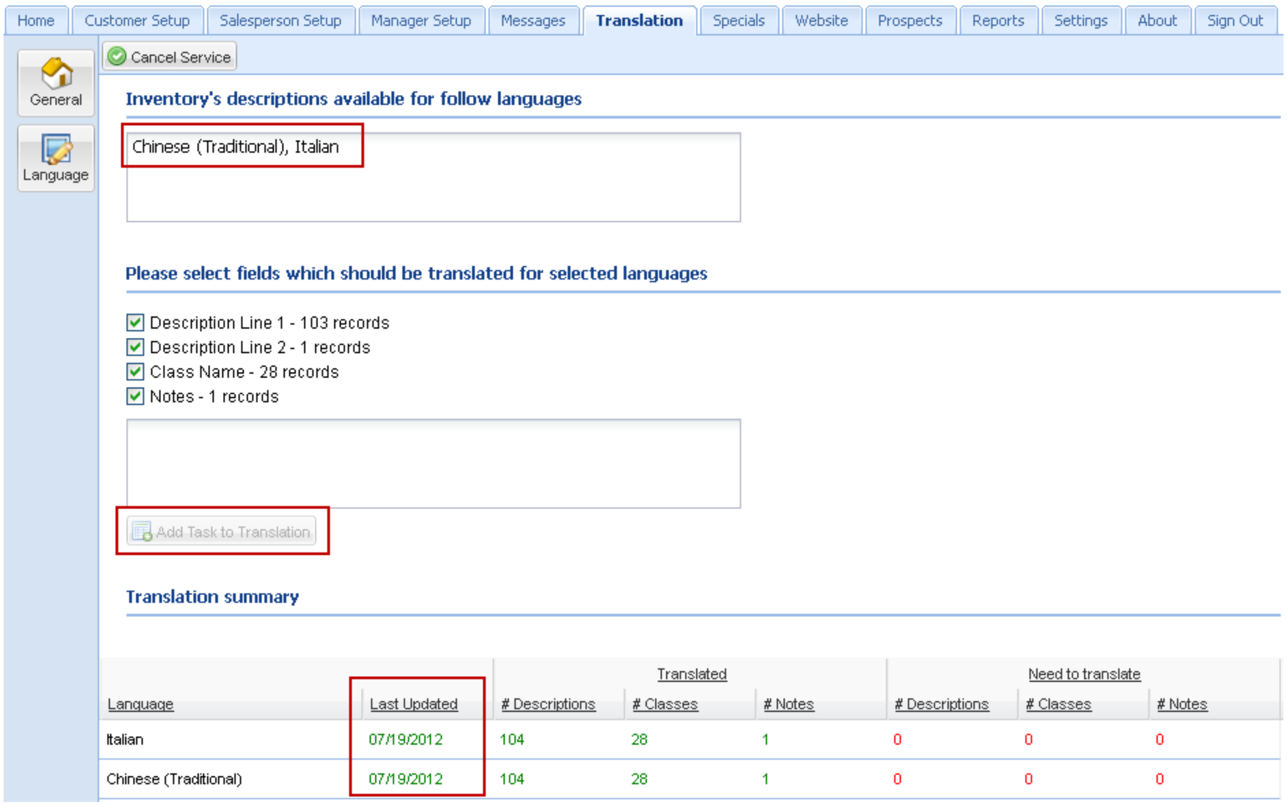
6. The **Server answer** message box will be displayed. Click **OK** to run the language translation process. Since most of your data has already been translated before this should be very quick.

As you can see in the background screen all your fields have been listed with the languages in the selection area.



7. When the translation data refresh is done you will see:

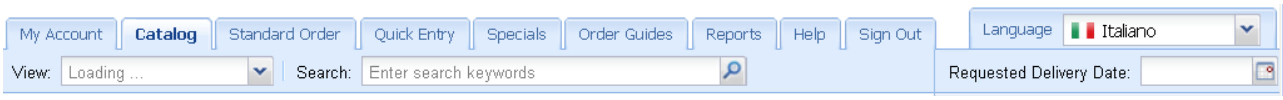
- The **Inventory's descriptions available for the following languages** section at the top of the screen will list your languages as available again.
- The **Add Task to Translation** button has been deactivated.
- The **Last Updated** field will now change and display the date of the latest translation of your data from this refresh data process.
- The **Translation Summary** section **Translated** area will update the values to show in **green** text how many fields are translated.



12.3 Translation Examples

- **What Your Customers will see in entrée.NET**

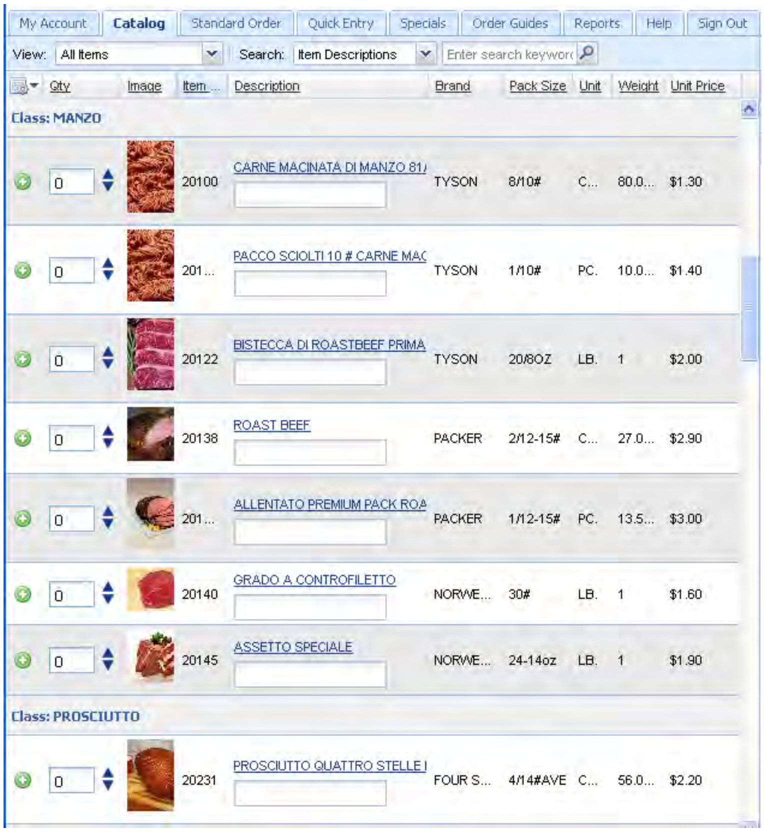
<u>Language Tab / Menu</u>:
If your customer has an account when they login there will be a new **Language** drop down menu. They will use it to select from English and any of the two other languages you choose for translation.



Once a customer makes a language selection from the Language drop down menu (above) they will see the following changes in **entrée.NET:**

<u>Catalog</u>
When view **By Class** (right) is selected the Class information will be displayed in the selected language. The language here is Italian.

When view **All Items** (below) is selected the Description and Classes will be displayed in the selected language.



Standard Order and **Shopping Cart**

The Description column and Class will be displayed in the selected language.

In the 3 Standard Order screen examples following we have English, Italian and Chinese (Traditional) translations for the same items in the order screen and the Shopping Cart. The **Language** tab displays the current language.

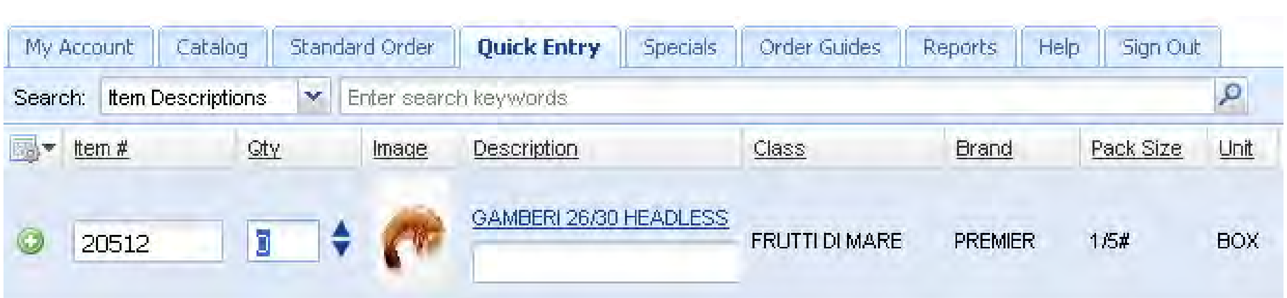
Italian

- In the Italian screen above that “ROAST BEEF“ was not translated. Remember this is <u>not</u> a perfect process but most words will be translated.

Chinese

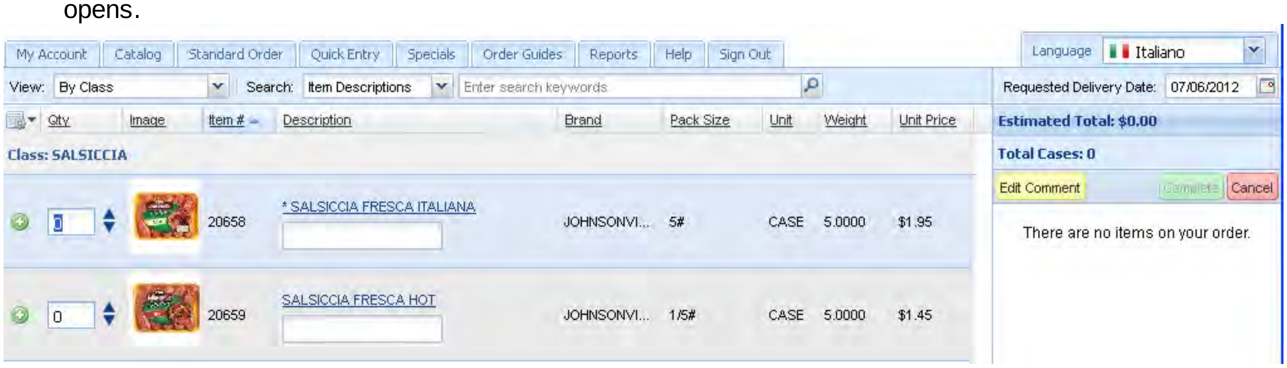
<u>Quick Entry & Specials</u>

When the item number is entered the Description and Class information will be displayed in the selected language.

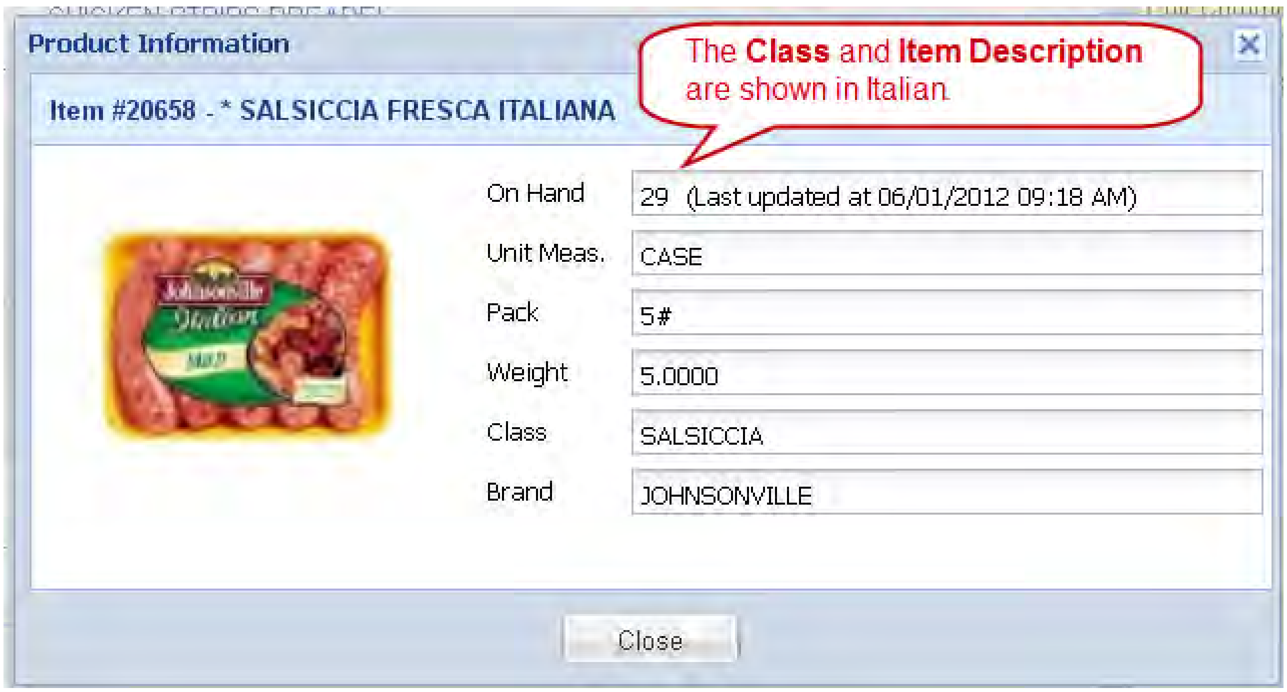


Product Information

When the blue **Description** column link in your product catalog is clicked the **Product Information** box opens.



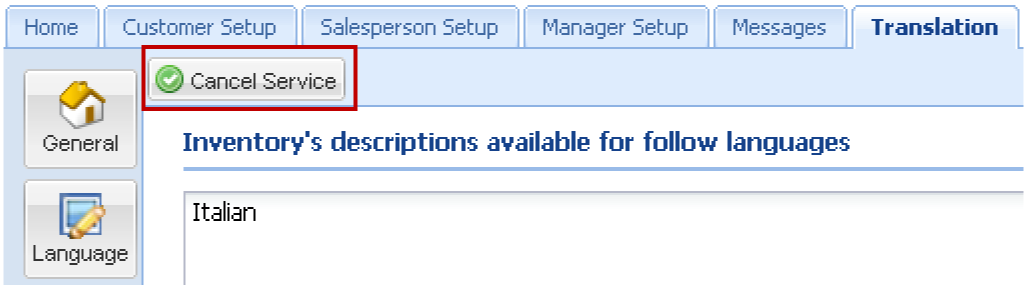
The item's Description and Class information will be shown in the selected language, if those fields were selected for translation.



12.4 Translator Service Cancellation

You can cancel the Language Translator Service whenever you like. An email will be sent to NECS to cancel your service. **entrée.NET** will automatically deactivate the language translator features when the **Cancel Service?** confirmation has completed.

1. Click the **Cancel Service** button in the **General** screen of the **Translation** tab.



2. The **Cancel Service** confirmation dialog box will display. Click **Yes** to confirm or **No** to cancel deactivation of the Language Translator Service.

3. An email will be sent to NECS to cancel your service and **entrée.NET** will deactivate the Language Translator Service features automatically.

Reminder: You can re-activate the Language Translator Service at any time.

Chapter 13

Specials Setup

13 Specials Setup

Everyone loves a special and **entrée.NET** makes it easy for you to highlight them for your customers. The **Specials** tab allows you to easily manage and display weekly featured items.

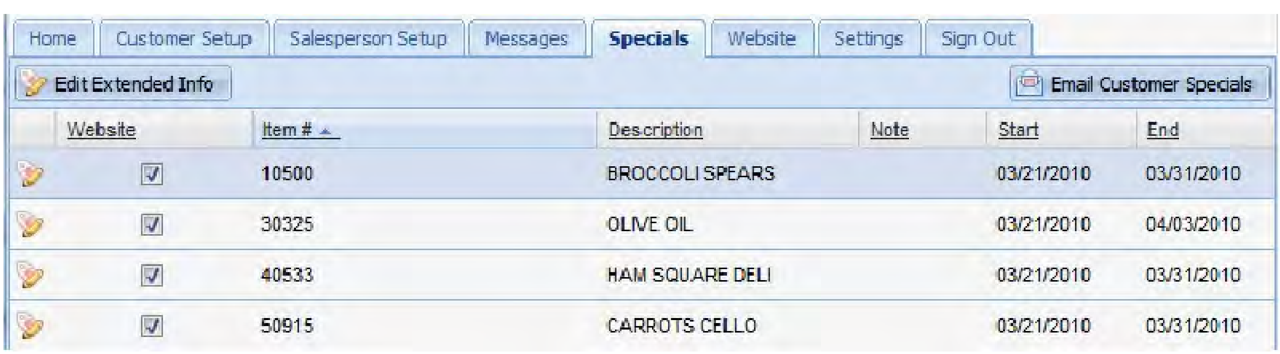
You can control whether specials will appear on your company’s website Specials page, add an image and a description (with an NECS designed site).

Your customers will view an informative list of all your specials, as well as see specials as they enter their orders and receive emails that are sent automatically. Sale and break pricing information will be displayed to customers for products that qualify while ordering.

Specials Tab

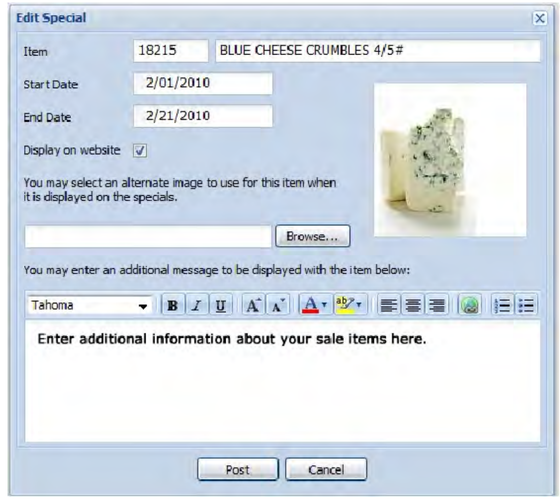
Click on the **Specials** tab to view the **Specials** screen. **entrée.NET** will then display all the items from your main **entrée** system that have been defined in the “Sale Pricing” tab of **Inventory File Maintenance**.

- **Edit Extended Info button:** Edit Extended Info displays the **Edit Special** dialog box for the selected item. Functions the same as the **Edit Extended Info icon.**
- **Email Customer Specials button:** Email Customer Specials runs the dialog used to email information about all your specials to your customers.
- **Edit Special icon:** Click to edit the special. The **Edit Special** dialog box will be displayed. You can add an image and a note to the special.
- **Website:** Check this box if you want the special to be displayed on the **Specials** page of your website.
- **Item #:** The item number from your main **entrée** system.
- **Description:** The product description from the main **entrée** system.
- **Note:** Comes from the message you enter in the **Edit Special** dialog.
- **Start:** The start date for the item special taken from the main **entrée** system data.
- **End:** The end date for the item special taken from the main **entrée** system data.



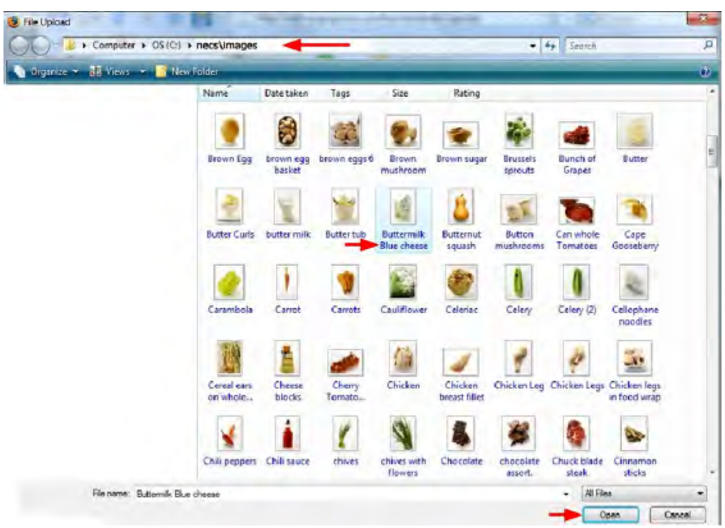
Editing Specials

1. Click on the **Specials** tab.
2. Click the **Edit Special** icon for the item you would like to edit.
3. The **Edit Special** dialog box will display with the item's information from the **Specials** tab.
4. **Display on website:** You can also change this setting here.
5. You may select an alternative image to use for this item when it is displayed on the specials.



Adding an image to the Special item

1. Click the **Browse** button.
2. The **File Upload** window will now open.
3. Find **C:\necs\images** your **entrée** images folder on your computer.
4. Double click to open your images folder.
5. In the tool bar set the **View(s)** so you can see the images. Some browsers use "thumbnails" or "icons" in their **View(s)** menu to display images. Find the desired image and click on it to select it.
6. Click the **Open** button and the image will be loaded and displayed in the **Edit Special** dialog box.



7. You may enter an additional message to be displayed with the item below. Enter a message or information about the special or the product in the message box. Use the tools above to control the font, color and format of your message.

8. Once you have completed editing your Special click the **Post** button.

9. Your special is now updated. It will appear in your customers Specials tab and be posted on your website Home page and Specials page, if you checked the **Display on website** option.

What will your customers see after you post your Specials?

- This is an example of what your customer would see in their **entrée.NET Specials** tab.
- The “View Specials By” drop down menu allows your customers to select “Featured”, “All”, or any class defined with specials.

Example Website **Specials** page where your customers will find all the featured specials with the **Display on website** option checked. Customers also have the option to print your product catalog from your website.

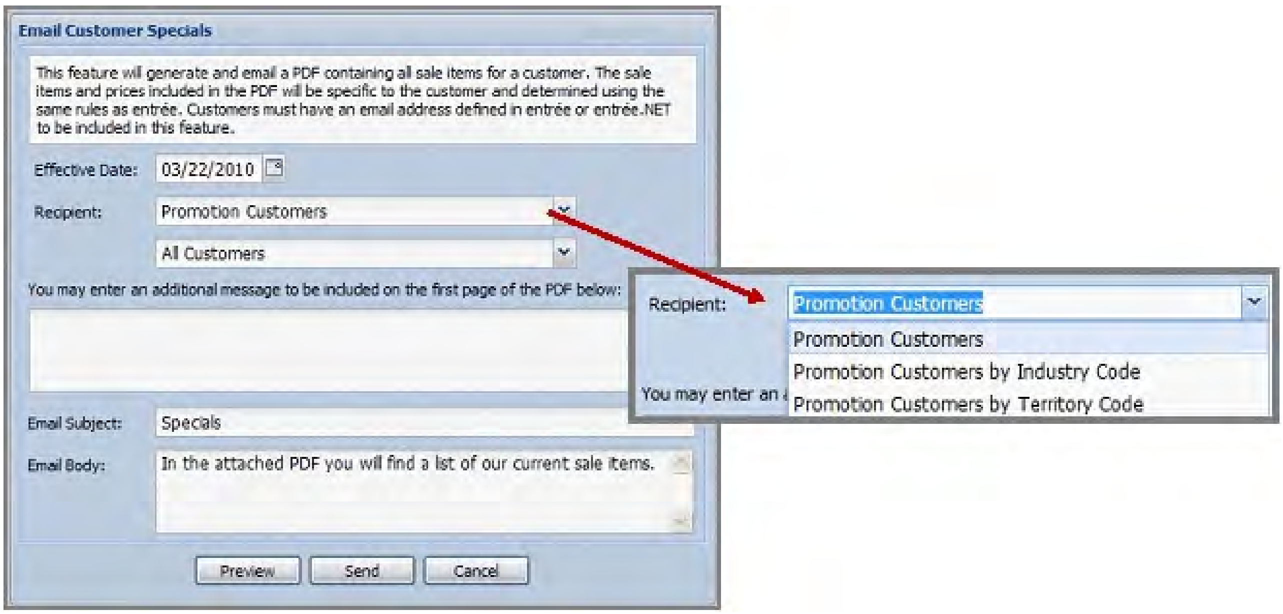
Emailing Customer Specials

1. Click on the **Specials** tab.
2.
3. Click the **Email Customer Specials** button.

4. The **Email Customer Specials** dialog box displays.

5. **Effective date**: Use the calendar tool to select an effective date for the specials in your email.

6. **Recipient**: Select from the drop down who should receive this email. Your options are: Promotion Customers, Promotion Customers by Industry Code and Promotion Customers by Territory Code or All Customers in the lower drop down list.



6. **You may enter an additional message to be included on the first page of the PDF below:** Enter the message you want to appear in the first page of the Sale Items Report you are emailing.

7. **Email Subject: Specials** is automatically entered. You can edit the subject if you like.

8. **Email Body:** Enter the message you would like to send with this email.

9. Click the **Preview** button to see the specials PDF document that will be emailed to your customers. A new browser page will open displaying a box with the title "Sale Items Report Preview" If you do not have the Adobe Reader installed on your computer use the link provided to get this free software. Click on **Click the link to download the preview**. In the next window click **Open** to view the **preview.pdf** file.

10. Click the **Send** button to send the email to your customers.

11. Click **Cancel** to stop the email process.

Example **Sale Items email sent to a customer.**

Sale items for
BIG AL'S
Effective 04/12/2010

entree.NET Distributor
168 Boston Post Rd
Madison, CT, 01902
Phone: (203) 555-9000
Fax: (203) 555-9999

Good Morning Customers.
These are the sale items for this week. Thank you for your business.
Have a great day.
Your Food Distributor

BEEF SPECIALS

loose pack 10# ground beef — PC.
Item #: 20100B Brand: IBP Size: 1/10#
Regular Price: $1.47 On sale for $1.45

CANNED GOODS SPECIALS

TOMATO SAUCE — CASE
Item #: 30148 Brand: PARADE Size: 6/10
Regular Price: $20.27 On sale for $19.95

FROZEN VEG SPECIALS

BROCCOLI SPEARS — CASE
Item #: 10500 Brand: CODE Size: 12/2#
Regular Price: $19.81 On sale for $17.50

HAM SPECIALS

HAM FOUR STAR ROUND — PC.
Item #: 20231B Brand: FOUR STAR Size: 1/14#AVG
Regular Price: $2.45 On sale for $2.30

PASTA SPECIALS

PASTA FETTUCINI — CASE
Item #: 30459 Brand: PRINCE Size: 1/20#
Regular Price: $14.82 On sale for $13.90

PRODUCE SPECIALS

CARROTS CELLO — CASE
Item #: 50915 Brand: PACKER Size: 48/1#
Regular Price: $14.28 On sale for $13.00

Chapter 14

Home Tab

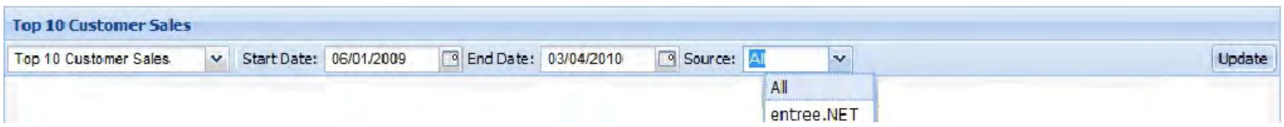
14 Home Tab

When you first login to **entrée.NET** version 3 you will land on the **Home** tab. This area provides you with important information related to customer call lists, online orders that have been placed, along with some simple graphs to give you a visual picture of your top salespeople and customers.

Viewing Sales Graphs

These sales graphs can access up to 13 months of sales history, from both sales recorded on your main **entrée** software and on the sales from **entrée.NET**.

The **Home** tab gives you the option to run and view one of two bar graph reports, the Top 10 Customers Sales and Top 10 Salesperson Sales.



How to Generate a Graph

1. Select a either "**Top 10 Customer Sales**" or "**Top 10 Salesperson Sales**."

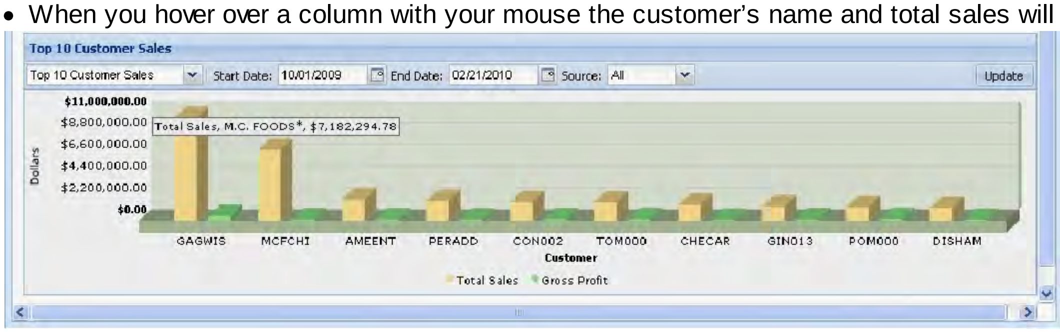
2. Use the calendar tool  to select the desired **Start Date** and **End Date**.

3. Choose your data **Source** from the drop down list.
   - **All** – The report will use data from the **entrée** system and **entrée.NET**.
   - **entrée.NET**- This report will only use data from your online ordering system.

4. Click the **Update** button to generate the graph. The new graph will now display on your screen.

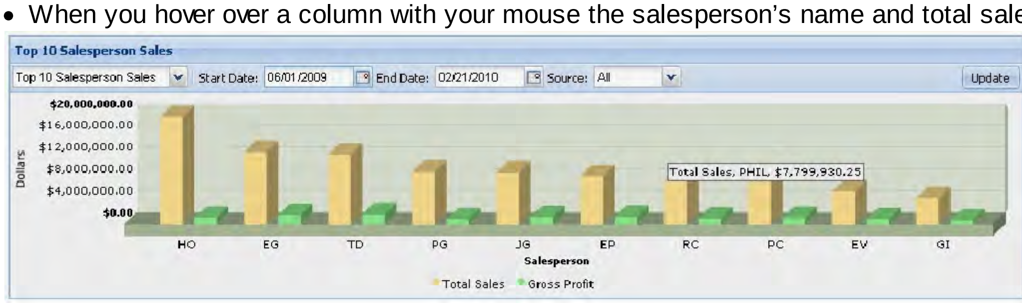
Example **entrée.NET** distributor's Top 10 Customer Sales report.

- When you hover over a column with your mouse the customer's name and total sales will be displayed.



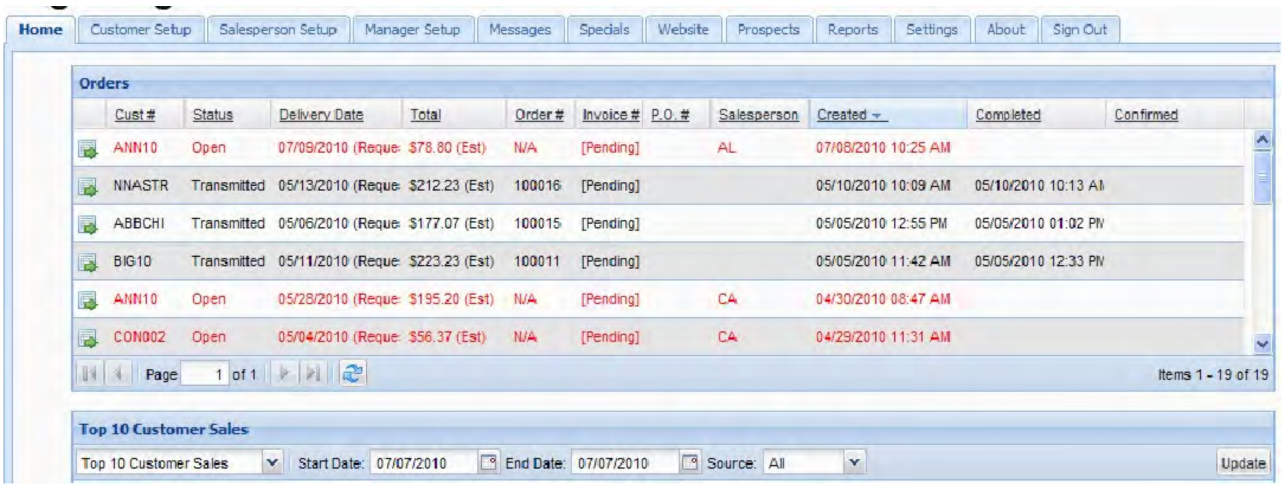
Example **entrée.NET** distributor's Top 10 Salesperson Sales report.

- When you hover over a column with your mouse the salesperson's name and total sales is displayed.



Orders

New online orders are the growth area for your business. Tracking the status of online orders could not be an easier task. Every time you log in the **Home** tab presents you with a list of all your online orders. You can view individual orders, all their information and order dates.



View Order icon used to view the order details.

Cust # column shows the **entrée** system customer number for the account.

Status column

The Status column will show you the current status of your customer's orders:

- **"Pending"**: The order has been completed by the customer, and is waiting to be picked up by the main **entrée** system. The **.NET Order #** has been assigned to this order in your **entrée.NET** online system.
- **"Transmitted"**: The order has sent to you, but it has not yet been confirmed.
- **"Received"**: The order has been officially received into your main **entrée** system, and has been assigned an invoice number.

Delivery Date column

Shows the customer's requested delivery date. Once the order is in the **"Received"** status, the actual delivery date will be posted here.

Total column

This column will show the total amount due on that order. Note that until the order has been officially "Received", the total shown will only be estimated, designated with "(Est)" next to the amount.

Once you have received the order, the **entrée** system will calculate the actual invoice total and show it in this column. Many factors can affect the invoice total including catch weights, sale items expiring, inventory shortages on our side, item substitutions, fuel and delivery surcharges, etc.

.NET Order # column

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

Note The "invoice number", which corresponds to the unique number on the invoice document sent to the customer when you make your delivery, gets assigned after the order has been "Received".

Invoice # column

Shows the number assigned by your main **entrée** system to this order. It is the same number that will appear on the customer's invoice document.

P.O. # column

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

Salesperson column

Displays the name of the salesperson assigned to that customer account.

Created column

Shows the date and time the order was created by the customer.

Completed column

Shows the date and time the order was completed.

Confirmed column

Shows the date and time the order was confirmed by the main **entrée** system.

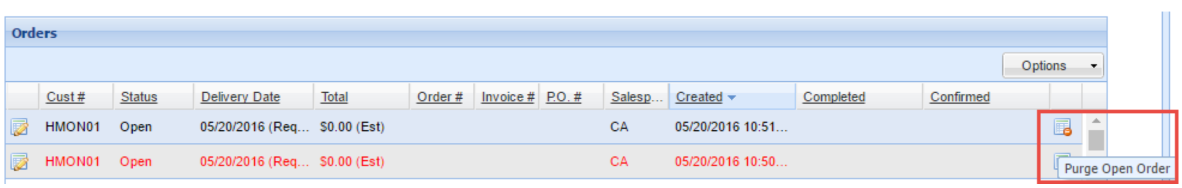
Open Order Purge Feature

When you have abandoned *open orders* that you need to remove from the system go to the Home tab Orders area. You have the ability to purge these orders one at a time using the **Purge Open Order** button or By Date using the **Options** menu.

Purge an Open Order

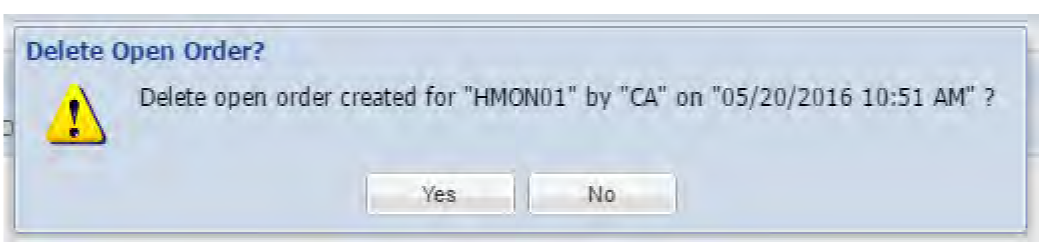
1. In the Home tab Orders area select the open order you need to remove.

2. Click on the **Purge Open Order** button.(Outlined in the image below)



3. The **Delete Open Order?** dialog box will open.

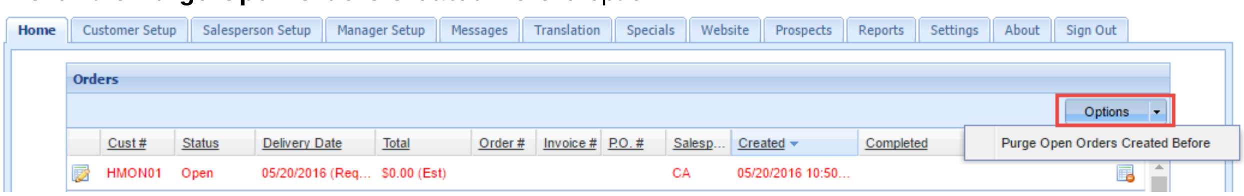
4. Click **Yes** to proceed with the removal of the open order. Click **No** to cancel the removal.



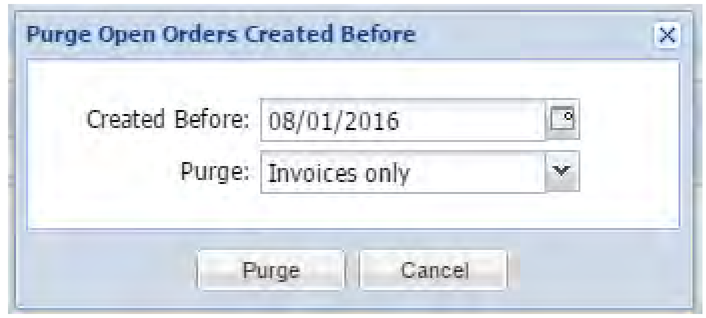
Purge Open Orders By Date

1. In the Home tab Orders area click on the **Options** drop down arrow.(Outlined in the image below)

2. Click the **Purge Open Orders Created Before** option.

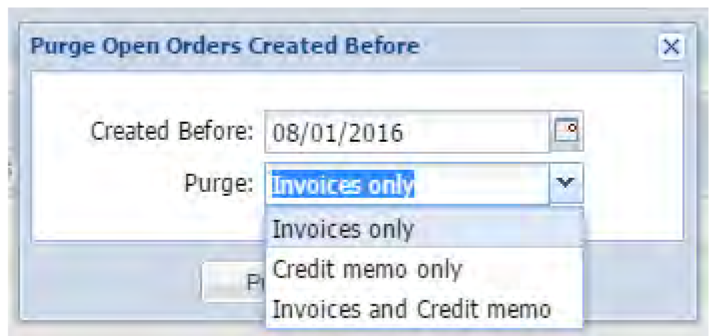


3. In **Created Before** use the calendar tool to select your date. All open orders before this date will be removed from the system.



4. Click the **Purge** drop down menu arrow and select from **Invoices only**, **Credit memo only** or **Invoices and Credit Memos**.

5. Click the **Purge** button to complete the removal process.



Chapter 15

Prospects Tab

15 Prospects Tab

The purpose of the “Prospects” feature is to provide the distributor with a set of tools which can be used by the distributor and your salespeople to manage and prepare quotes for potential customers. Three new tabs have been added to your menu to support this feature; **Prospects**, **Manager Setup** and **Reports**. The **Prospects** tab is where you will create and maintain your prospects information, guides and eventually convert your prospects to regular customer accounts. The **Manager Setup** tab is used to provide administrative access to managers or salespeople for managing prospects of your website. The **Reports** tab contains two new reports created to support prospect management, the “Prospect Listing” and “Prospect Guide”.

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

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

Enabling the Prospects Feature

First Perform Settings Tab Updates

1. Click the **Settings** tab.

2. Click the **Options** button on the left.

3. Go to the **General** section.

4. Click in the “Current Settings” column to set these options to **Yes**.

    a. **Enable “Prospects” feature.** Turning this option on will display the “Prospects” and “Reports” tab for the distributor and designated salespeople in the system.

    b. **Create prospects for quote requests from the website.** Set this option only if you have the website option and prospects will automatically be created in the system.

5. Go to the **Salesperson assigned to new prospects** option.

6. Select a salesperson from the drop down list**.** This option allows you to assign a default salesperson to manage the prospects generated from your website. This option is **not** required for the prospects feature to work.

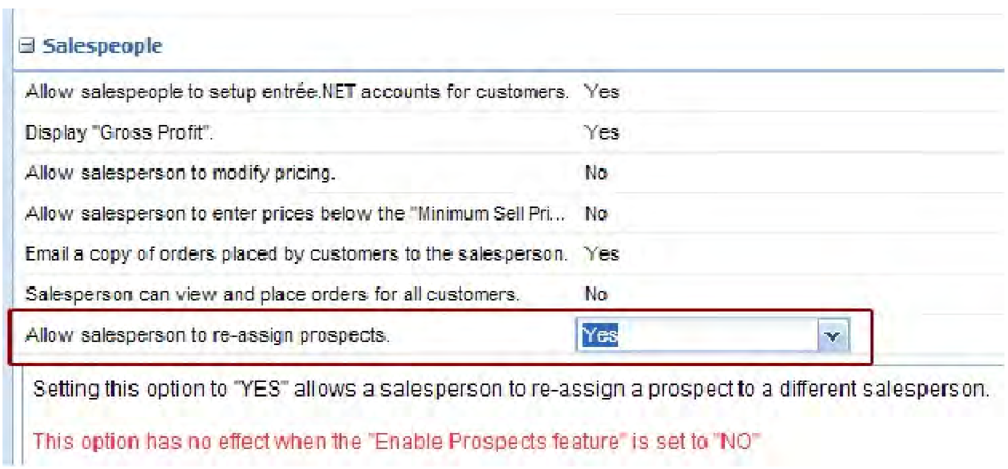
The General section of Options in the Settings tab.
The current settings and drop down list have been set to enable the Prospects feature.

7. Go to the **Salespeople** section.

8. Set the **Allow salesperson to re-assign prospects** option to **Yes**.

   This option controls if a salesperson has permission to transfer a prospect to a different salesperson. Generally this functionality is only provided to the distributor or a prospect manager. Designating an employee as a prospect manager will be covered later in this chapter.

Note This option has **no effect** when the “Enable Prospects feature” is set to “No”.



9. Once the modifications to the **Settings** tab are completed the system will automatically update.

10. The new **Manager Setup**, **Prospects** and **Reports** tabs will appear in your menu.

11. Now the Prospects feature has been enabled in your **entrée.NET** system.

15.1 Designating a Prospect Manager

The **Manager Setup** tab has been added to the distributor's menu with the Prospects feature to allow for the creation and maintenance of manager accounts. These manager accounts can be assigned specific administrative roles in the **entrée.NET** system. Currently the two roles supported are:

Manage Website	Allows the account to access and modify content in the "Website" section.
Manage Prospects	Allows the account to access and modify content related to the "Prospects" feature.

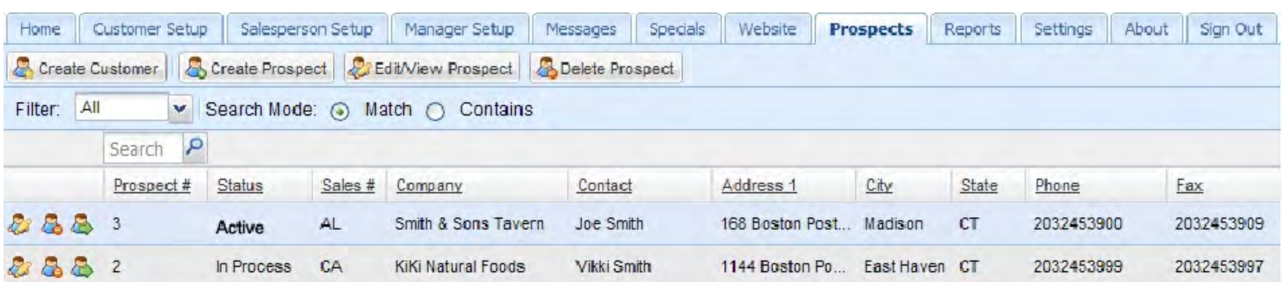
If you would like to create a Prospect Manager to assist with or oversee the processing of prospects for your company proceed to the **Manager Setup Tab** chapter for the details**.**

Prospects Tab Overview

The **Prospects** tab is where prospect accounts are created, edited, deleted and converted to customer accounts by the designated prospects manager or salespeople. If you have the website option prospect accounts will be created automatically via the website when a potential customer uses the "Request Quote" feature in the Catalog page.

The rules for editing a prospect account are slightly different for the managers. The salesperson is allowed to edit **one** "guide" for a prospect to use for quoting prices.
The prospect guide is very similar to the **Order Guide** feature provided in the system for customers. The prices in the prospect guide can be edited as required by your salespeople.

When a prospect is ready to become a real customer the salesperson will check the "Ready to Convert" check box and the status of the prospect will be set to the "Pending".
Salespeople will **not** be allowed to make any additional changes to the prospect at this time. Only the prospects manager can continue to change the prospect information and prospect guide until it has been converted to a customer.



Prospects Tab Screen Details

- **Create Customer** button - Click to initiate the conversion of the prospect account to a customer account.
- **Create Prospect** button – Click to create a new prospect account.
- **Edit / View Prospect** button – Click to edit or view a prospect account.
- **Delete Prospect** button – Click to delete a selected prospect account.
- **Filter** – A drop down list of the status values or "All" used to filter the prospect accounts list.
- **Search Mode** - Select either "Match" or "Contains".

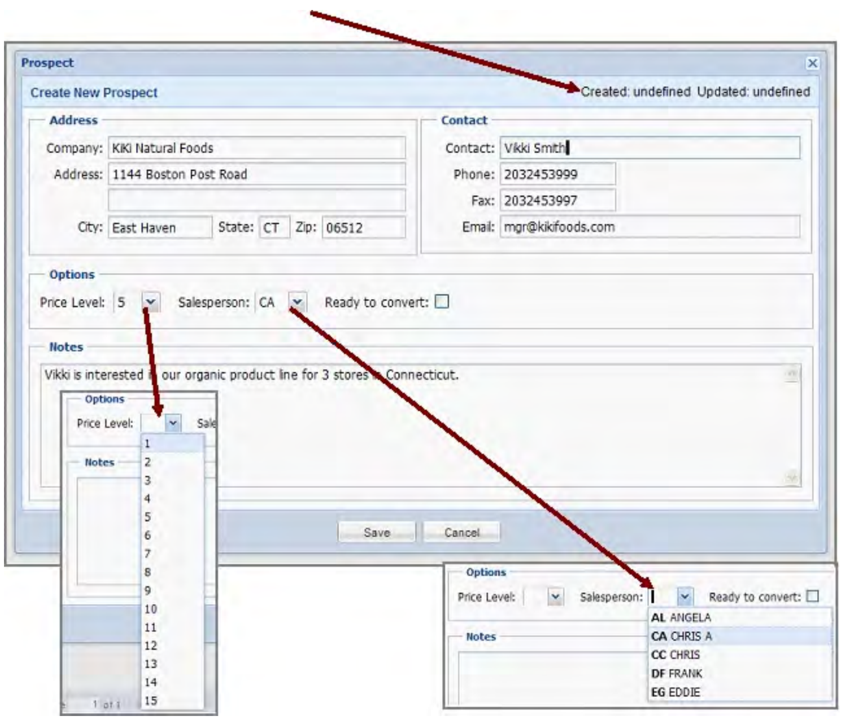
- **Search box** - Type a word or letters here then click the search icon to get your results.
- First column – contains the icons for **Edit / View Prospect,** **Delete Prospect** and **View Prospect Guide** functions.
- **Prospect #** – The prospect number assigned by the system when the account is created.
- **Status** – The current status of the prospect account.
  Possible values are: “Active”, “Pending”, “In Process” or “Converted”.
  This value is controlled by the system.
- **Sales #** - The number of the salesperson assigned to the prospect.
- **Company** – The name of the prospect seeking price quotes.
- **Contact** – The prospect contact person’s name.
- **Address 1** - The street address information for the company.
- **Address 2** – The 2nd line of the street address information for the company.
- **City -** The city where the prospects office is located.
- **State -** The state information for the prospect.
- **Phone -** The prospects phone number.
- **Fax -** The prospects fax number.

15.2 Adding New Prospects to entrée.NET

There are two ways prospects are added to **entrée.NET**: manually by using the **Prospects** tab. Or if you have the website option prospects are automatically created in the system by turning on the **"Create prospects for quote requests from the website."** option. To manually create a new prospect account in the **Prospects** tab:

1. Click the **Prospects** tab.
2. Click the **Create Prospect** button.
3. The **Create New Prospect** dialog box will display.
4. Fill in your prospect's **Address** information.
5. Fill in the **Contact** information.
6. In the **Options** section make selections for:
   a. **Price Level** from the drop down list.
   b. **Salesperson** from the drop down list.
   c. **Ready to Convert** will **only** be checked when the prospect is ready to be converted to a customer account.
7. **Notes** – Enter any notes about the prospect in the section provided to assist in your work with them.
8. Click **Save**.

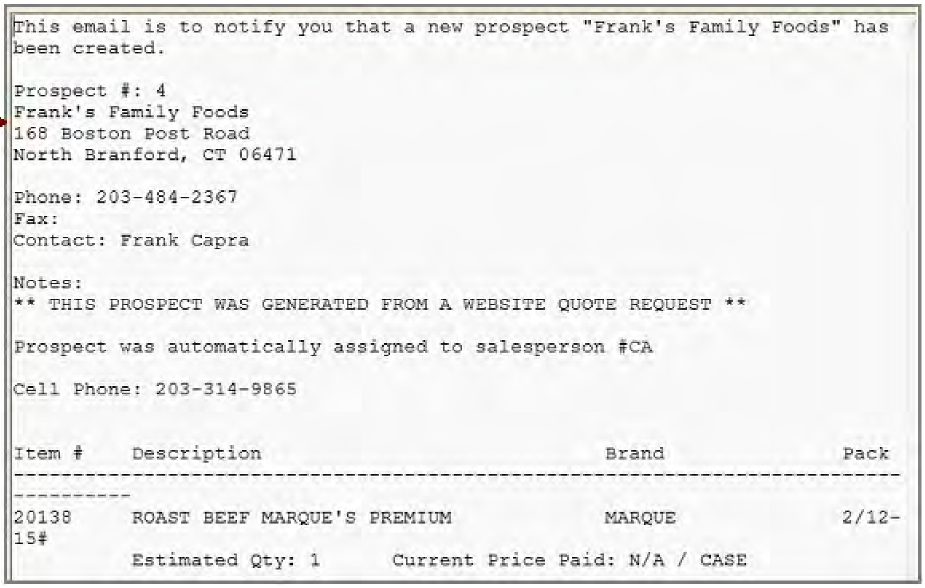
Note The **Creation** and **Updated** fields in the upper right corner are undefined.



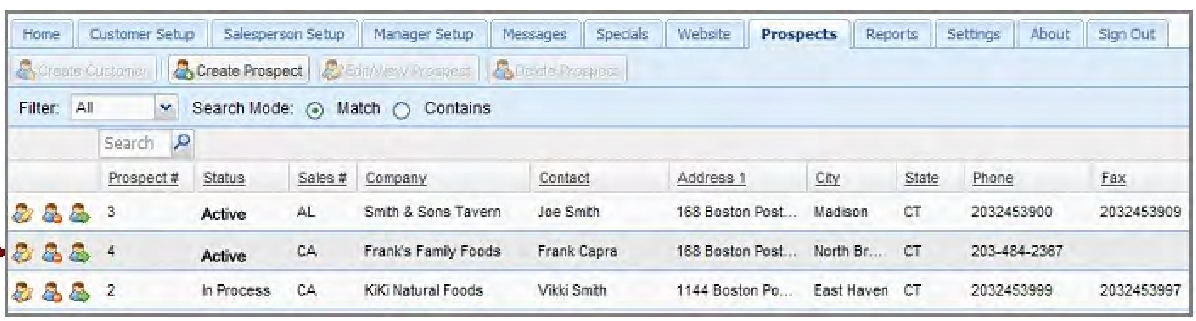
New Prospect Accounts from your entrée.NET Website

When the website creates a prospect account automatically from the **Request Quote** process emails are sent to you. The **Request Quote** process will send out email notifications as documented in the chapter on that topic in this guide. As a part of the **Prospects** feature a “new prospect notification” email will also be sent as a part of the **Request Quote** process. Examples of the emails notification and the list of accounts in the **Prospects** tab after the website has processed the quote request are shown below.

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

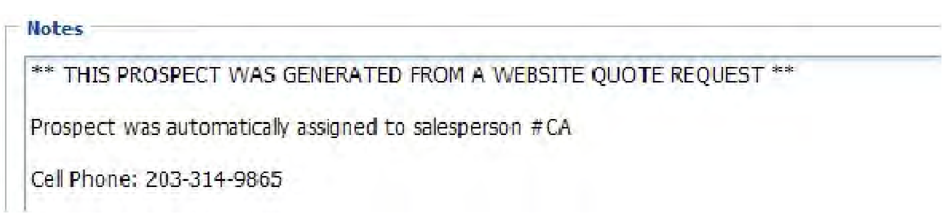


```
This email is to notify you that a new prospect "Frank's Family Foods" has
been created.

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

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

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

Prospect was automatically assigned to salesperson #CA

Cell Phone: 203-314-9865


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



Prospect #	Status	Sales #	Company	Contact	Address 1	City	State	Phone	Fax
3	Active	AL	Smith & Sons Tavern	Joe Smith	168 Boston Post...	Madison	CT	2032453900	2032453909
4	Active	CA	Frank's Family Foods	Frank Capra	168 Boston Post...	North Br...	CT	203-484-2367	
2	In Process	CA	KiKi Natural Foods	Vikki Smith	1144 Boston Po...	East Haven	CT	2032453999	2032453997

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



15.3 Edit / View Prospects

Once the prospect account has been created to manage the prospect use the tools in the **Prospects** tab. During the process of working with your prospects you will need to view, update their information, provide additional notes or create a prospect guide. The process to create prospect guides will be covered next in this chapter. To update your prospect accounts follow this procedure:

1. Click the **Prospects** tab.

2. Select and highlight the prospect account in the list.
3. Click the **Edit / View Prospect** button or the **Edit / View** icon.

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

5. Edit the prospect's **Address** information as required.

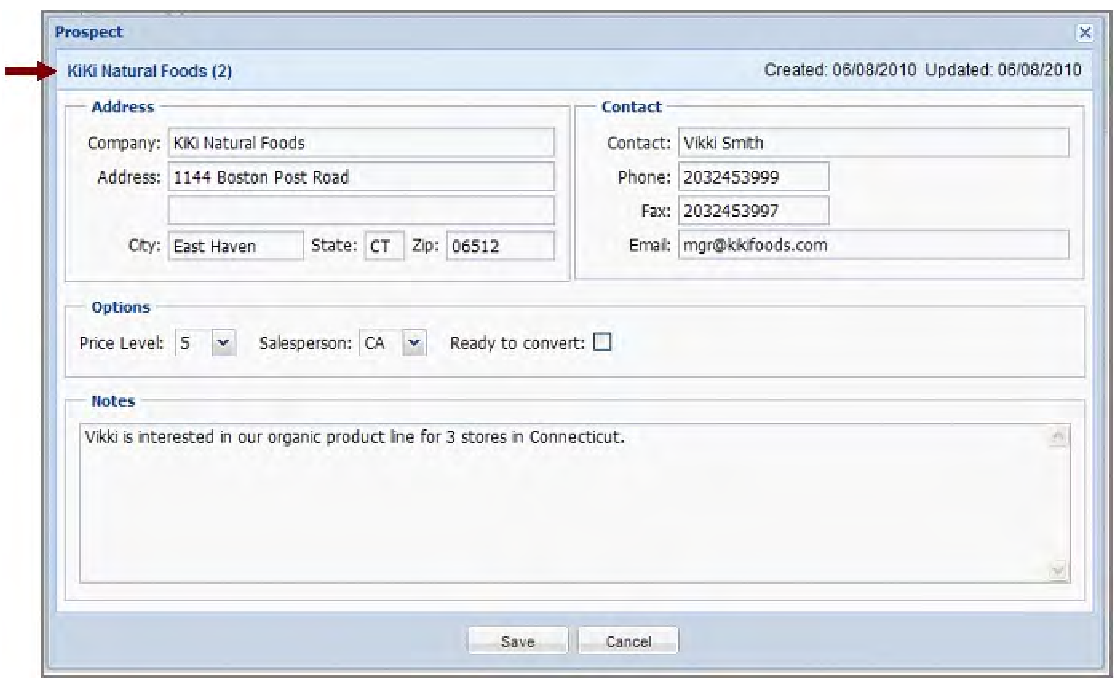
6. Edit the **Contact** information as required.

7. In the **Options** section make modifications as required for:
   a. **Price Level** from the drop down list.
   b. **Salesperson** from the drop down list.
   c. **Ready to Convert** will **only** be checked when the prospect is ready to be converted to a customer account.

8. **Notes** – Enter any additional notes about the prospect account to assist in your work with them.

9. Click **Save**.

Note The **Creation** and **Updated** fields in the upper right corner will be updated when the prospect account has been changed.



15.4 Deleting Prospects

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

1. Click the **Prospects** tab.

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

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

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

5. Click **Yes**.

15.5 Prospect Guides

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

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

Prospects Guide screen details:

- **Add Item** button - Click to add a new item to the guide list.
- **Remove Selected** button - Click to delete the selected item.
- **Add Category** button - Click to create a new category for the guide list.
- **Re-Apply Sort** button - Click to re-apply the previous sort.
- **Save Guide** button - Click to save the current information in the prospect's guide.
- **Cancel** button - Click to delete the current prospect guide.
- **Company** and **Prospect #**
- Green plus tool column
- **Seq –** The system Sequence number.
- **Category –** The product category.
- **Unit Price –** The unit price is an editable field in the prospect guide.
- **Item # -** The item number from the product catalog.
- **Description –**Click the blue description link to view the product information.
- **Class –** The item class.
- **Brand –** The item brand.
- **Pack Size –** The pack size for the item.
- **Unit** - The unit the item is sold by.
- **Weight –** The weight of the item.

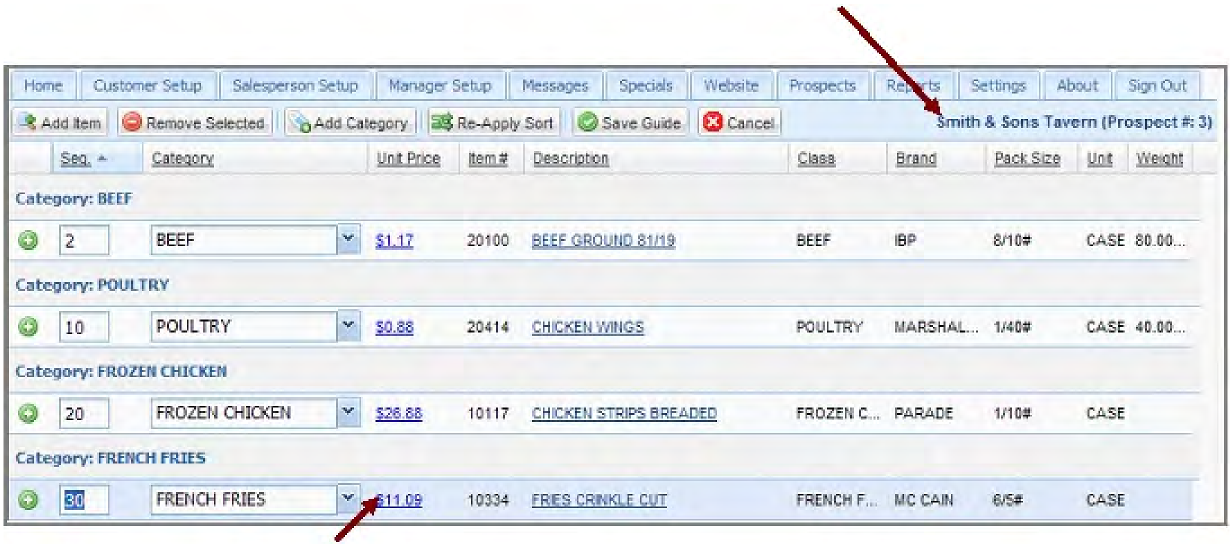
Note Item weight with a red asterisk * is the average weight.

Creating a Prospect Guide

1. Click the **Prospects** tab.

2. Select and highlight the prospect account who will receive the prospect guide.
3. Click the **View Prospect Guide** icon.

4. The **Prospect Guide** screen will display with the **Company** name and their assigned **Prospect #** in the upper right section of the menu.



The blue Unit Price is an editable field in the Prospect Guide screen.

5. Click the **Add Item** button to search for and add items to the prospect guide.

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

7. Make a selection from the **Search** drop down list. You can search by Item Description, Class or Item Number.

8. Type a word, class or item number in the search box.

9. Click the **Search** button.

10. When the search results are displayed, click the blue **Description** link to view the product information.

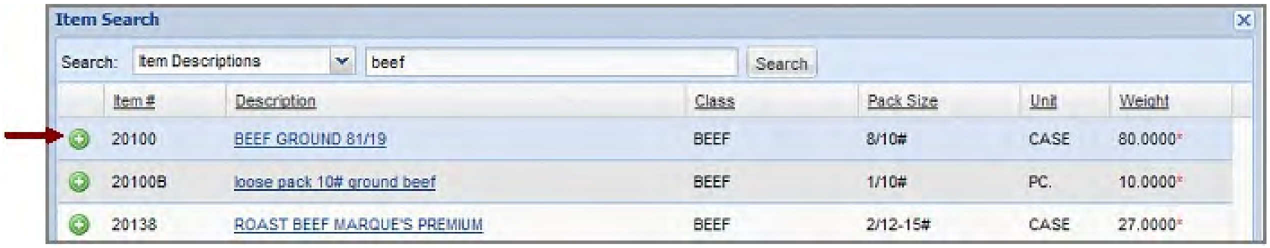
11. Click the green plus icon to add the item to your prospect guide list.

12. Continue the search and add item process until all the desired items are in the prospect guide.

13. Now you can edit the **Unit Price** for the selected items.

14. Click the **Save Guide** button.

Note You should save your guide after making any changes.



Above: A search of Item Descriptions for “beef”.
Below: A beef item added to the Prospect Guide screen.

Working with Prospect Guides

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

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

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

- **Re-Apply Sort**

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

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

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

15.6 Converting Prospects into Customers

1. Click the **Prospects** tab.

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

3. Click the **Create Customer** button.

4. The **Create Customer From Prospect** dialog box will display.

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

6. In the box for **Customer =** you will assign the new customer’s **entrée Customer #.**

7. Click the check boxes to select these options:
   a. Create “Standard Order” in **entrée** from items in the prospects order guide.
   b. Import prices from prospects order guide as the customers “Special price”.

1. Click the **Convert** button.

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

10. Click **Sign Out** to close **entrée.NET.** Next Login to your main **entrée** system.

11. To start the import of prospects and the creation of your new customer accounts follow these instructions for your version of **entrée.**

entrée V3 - Go to **Invoicing** > select the **entrée.NET**option > select **Import prospects.**

entrée V4SQL - Go to the **Add-Ons** ribbon menu > select the **entrée.NET** drop down menu > select **Import prospects**.

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

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

entree.NET Distributor

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

15.7 Prospects Email Templates

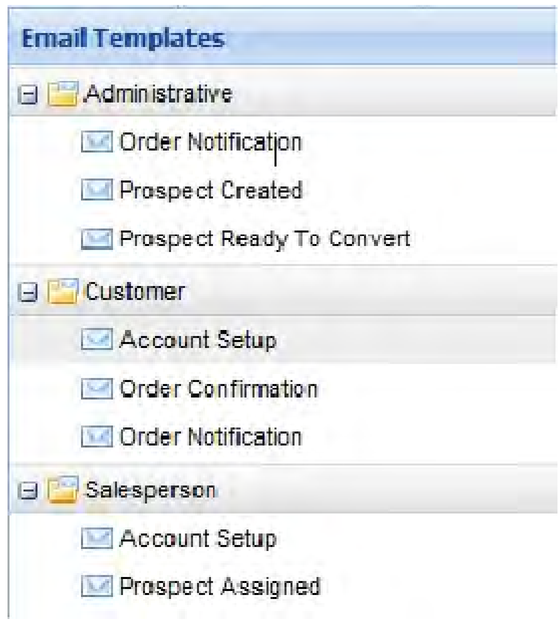
New email templates have been added to support the Prospects feature. These new templates can be accessed and updated for your company once you have implemented the Prospects feature.

Go to the **Settings** tab > **Email** button and select the templates you wish to customize. Please review the **entrée.NET Settings** chapter of this guide for more detailed information about email templates.

Templates under “Administrative” are used for emails sent to distributor or prospect managers.

Templates under “Customer” are used for emails sent to customers.

Templates under “Salesperson” are used for emails sent to your salespeople.



Chapter 16

Request Quote

16 Request Quote

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

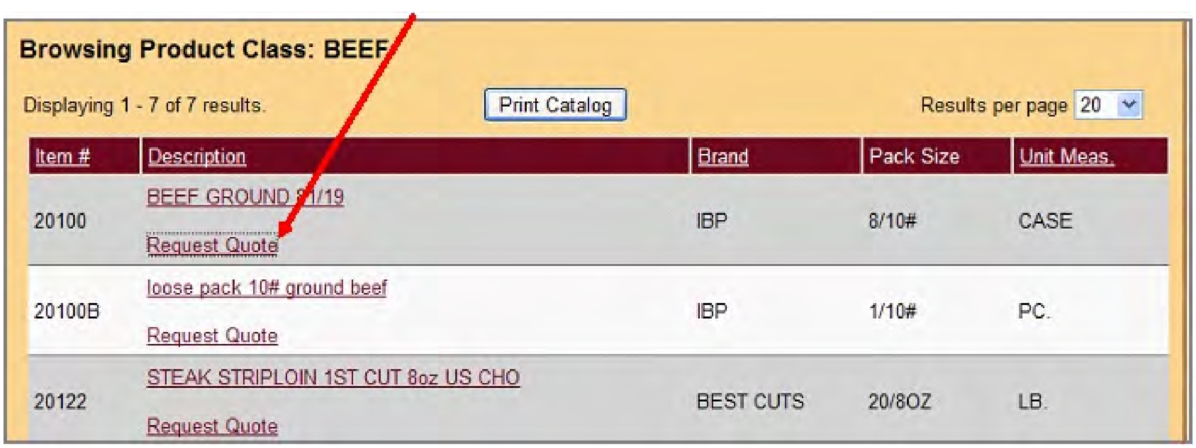
How to Request a Quote

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

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

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

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



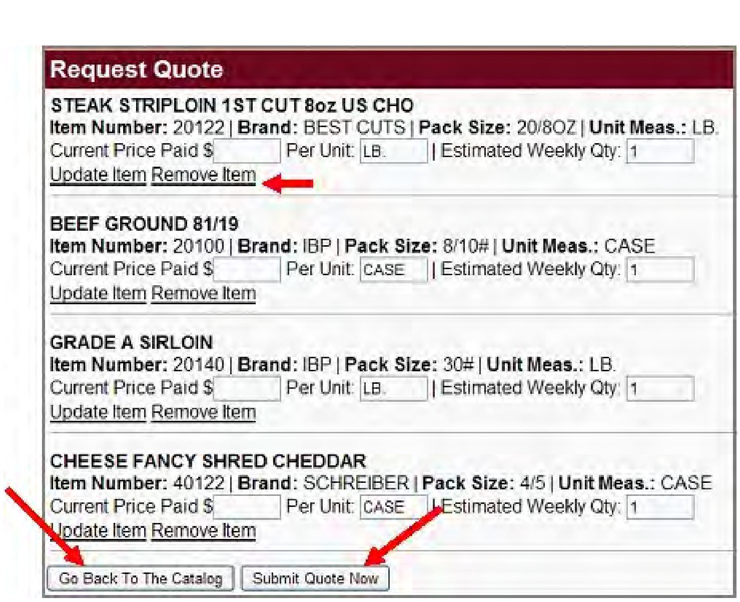
5. The item will be added to the **Request Quote** cart. All the items in this cart will be displayed on the **Request Quote** cart page. Each item in the list has an **Update Item** and **Remove Item** button.

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

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

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

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



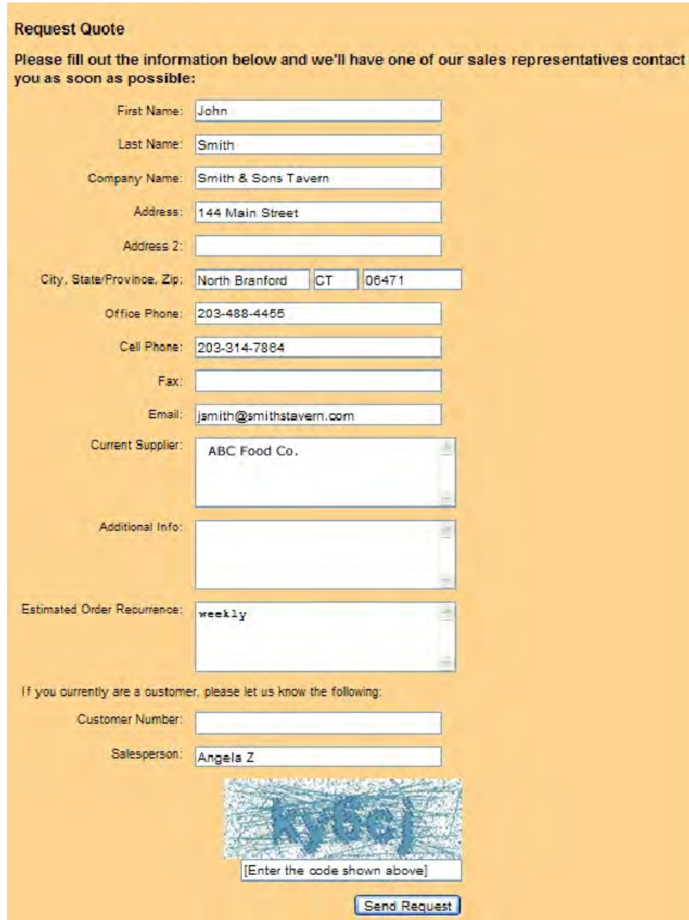
6. Fill in the **Request Quote** email form.

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

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

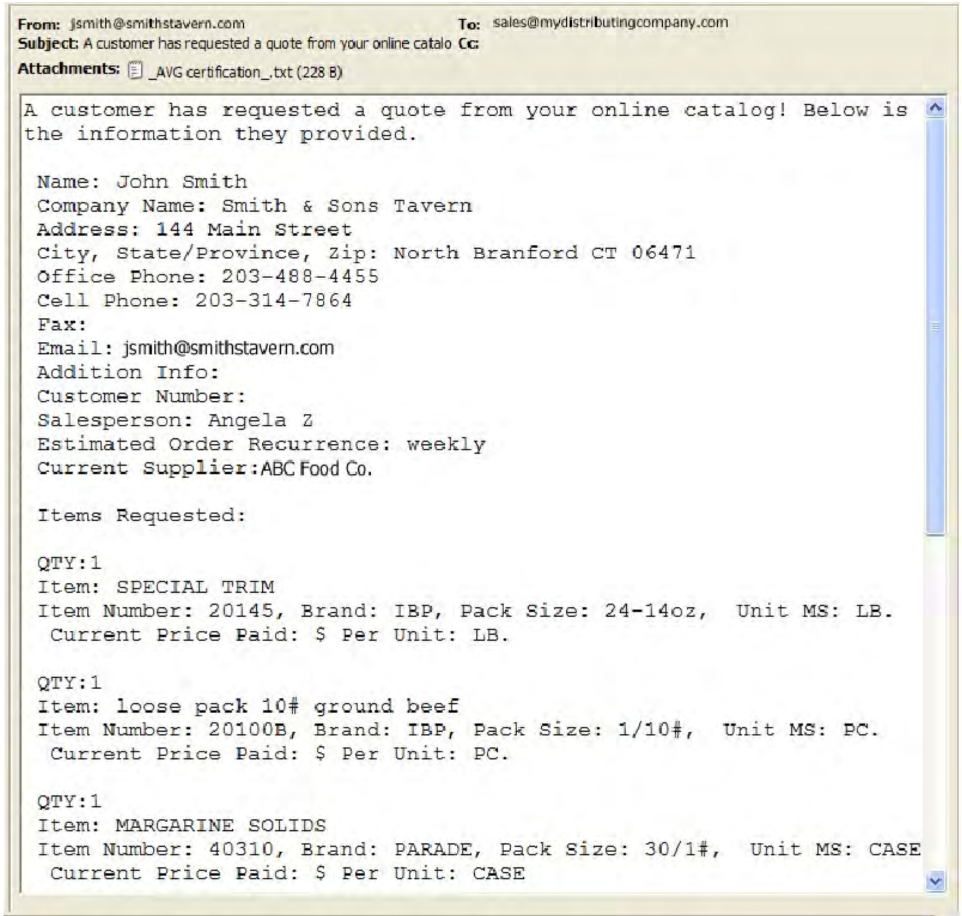
9. Click **Send Request**. An email will be sent to the email address you provided to confirm your request.

   The distributor will be sent an email with the **Request Quote** information the customer provided.



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

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



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

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

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

Items Requested:

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

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

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

Chapter 17

Manager Setup Tab

17 Manager Setup Tab

Designating Prospect / Website Managers

The **Manager Setup** tab has been added to the distributor's menu to allow for the creation and maintenance of manager accounts. These manager accounts can be assigned specific administrative roles in the **entrée.NET** system. The process of approving a prospect to be converted into a customer can **only** be performed by the distributor or a prospects manager. Currently the two roles supported are:

Manage Website	Allows the account to access and modify content in the "Website" section.
Manage Prospects	Allows the account to access and modify content related to the "Prospects" feature.

Note The account setup process will allow you to change an account **Username**. This authorization has also been provided to salespeople who have been given the ability to create accounts for customers.

The Manager Setup tab with a new manager account.

Manager Setup Screen Details

- **Create Account** - Click to create a new manager account.
- **Edit Account** – Click to edit an existing manager account.
- **Delete Account** – Click to delete a selected manager account.
- **Search Mode** - Select either "Match" or "Contains".
- **Search box** - Type a word or letters here then click the search icon to get your results.
- First column – contains the icons for the **Edit** and **Delete** functions.
- **Username** – The username assigned when the account was created.
- **Status** – Values are "Enabled" or "Disabled". This value is controlled by the System Administrator.
- **Email** – The account contact person's email address.

Creating Manager Accounts

If you decide to designate an employee as a “Prospects Manager” or “Website Manager” you will need to create a manager account for them in the **Manager Setup** tab. Follow these steps to create the new manager account:

1. Click the **Manager Setup** tab.

2. Click the **Create Account** button.

3. The **Create New Manager Account** dialog box will display.

4. Enter information for:

   a. **Username** – create a new username for the manager.

   b. **Password** – create a password.

   c. **Email** – current email address.

   d. **Disabled** – Can be used later to disable the account if needed.

5. For the **Select roles for this account:** section check boxes to designate the role for the new manager account.

   a. Manage Website

   b. Manage Prospects

6. Click **Save**.

7. The new manager account will now be listed in the **Manager Setup** screen

Edit / Disable / Delete Manager Accounts

Now that you have designated a “Prospects Manager” and / or a “Website Manager” if you need to make changes or remove the account completely you will use the **Manager Setup** tab.

- **Editing a manager account** –

1. Click and highlight the manager account in the list to select it.
2. Click the **Edit Account** button or the **Edit Account** icon in the leftmost column.
3. Make your changes in the **Edit Manager Account** dialog box.
4. This **Disabled** check box for the manager account can be updated here.
5. Click **Save**.

- **Deleting a Manager Account**

1. Click and highlight the manager account in the list to select it.
2. Click the **Delete Account** button or the **Delete Account** icon in the leftmost column.
3. Click **Yes** in the **Delete Accounts?** confirmation dialog box.

Chapter 18

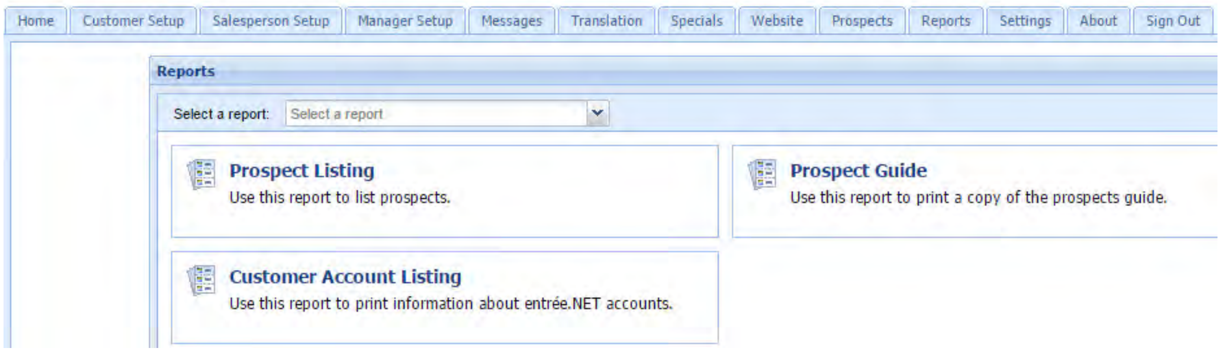
Reports Tab

18 Reports Tab

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

The reports currently provided are:

- **Prospect Listing**
- **Prospect Guide**
- **Customer Account Listing**



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

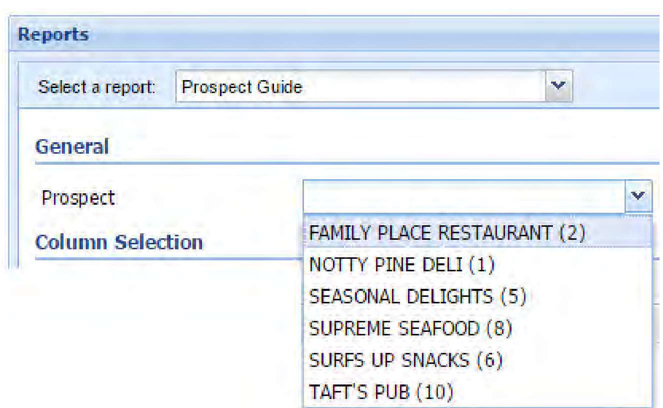
When you select the **Reports** tab you will be presented with a list of the available reports and a short description. You can access your reports via the main reports page link list or use the **Select a report** drop down menu. This drop down menu is available to you in all of your report generating and configuration pages.

Customizing Your Reports

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

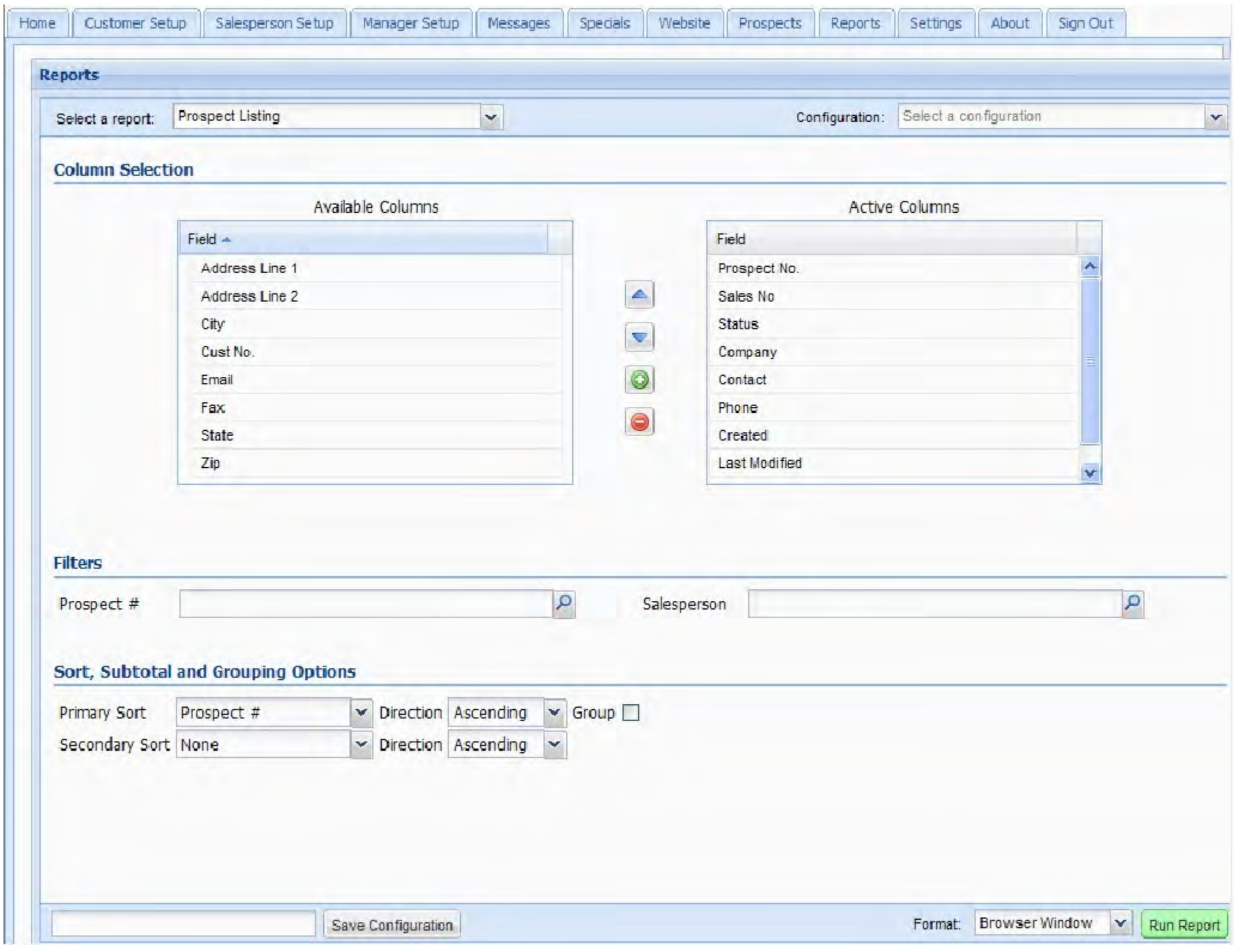
About Custom Report Generation

- Select a report using the drop down list and a saved custom report style from the **Configuration** drop down list.
- For the **Prospect Guide** report in the **General** section use the **Prospect** drop down list to select the desired prospect.
- Select your Prospect from the drop down list to run the **Prospect Guide report.**

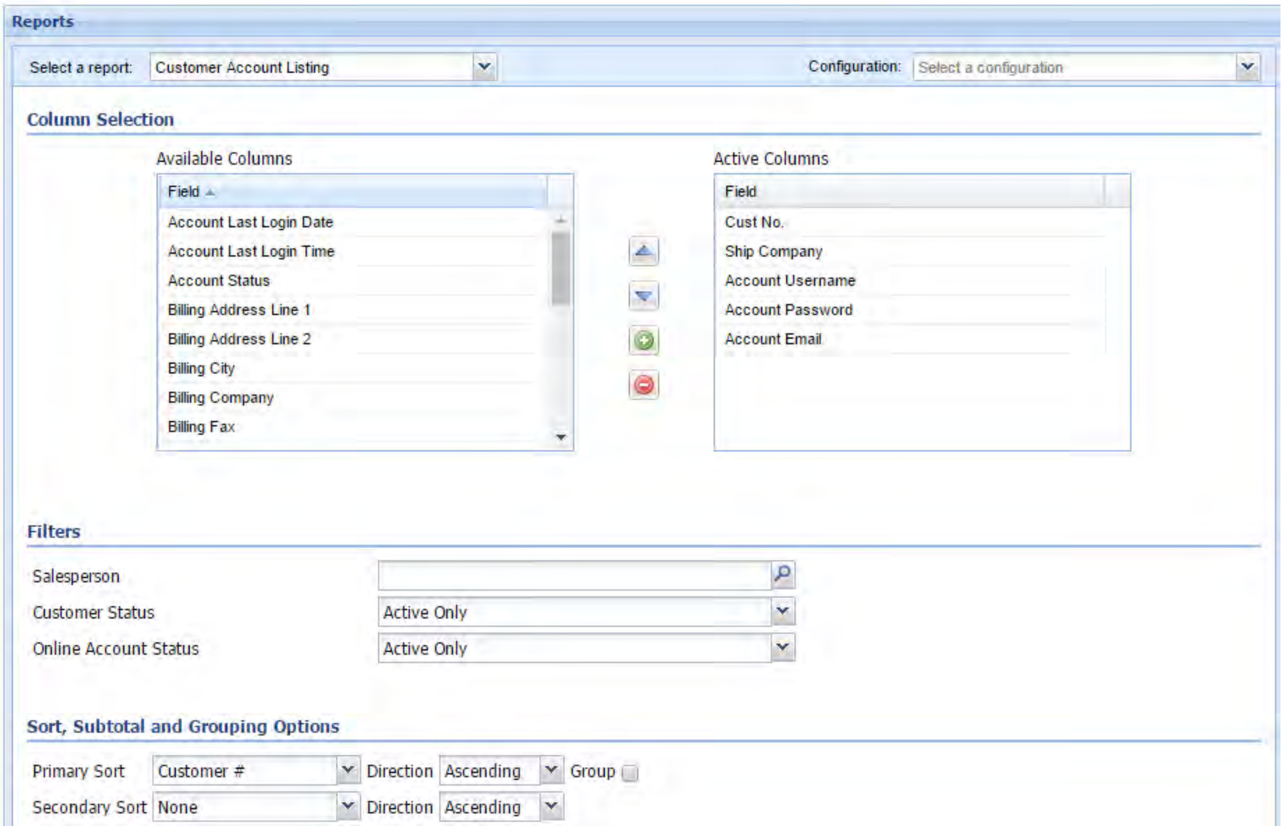


- Each report has an **Available Columns** list and **Active Columns** list. Move columns to the **Active Columns** list to be used in the final report. Use the tool, filters and sort options described below to further customize your report.

The Prospect List report **Available Columns** list and **Active Columns** list is shown below.



Customer Account Listing Report Options

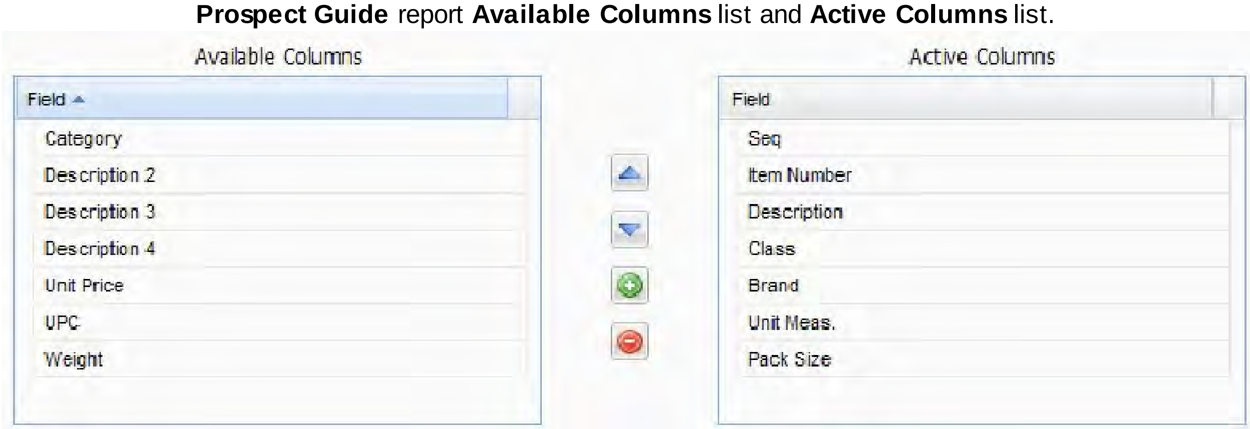


- **Tools for column selection and customization**

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

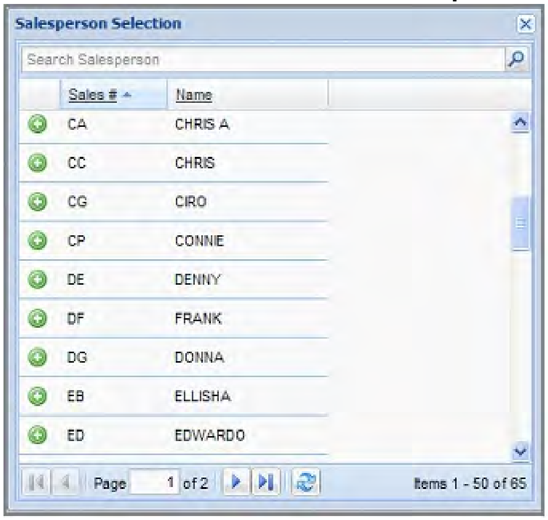
Plus and Minus buttons to add or delete fields from the **Active Columns** list.
Click on a field then click the plus or minus button to update your list.
You can also drag and drop report columns using your mouse.

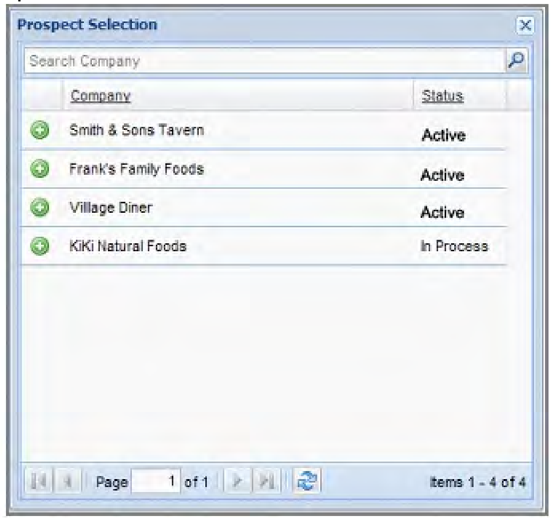
Prospect Guide report **Available Columns** list and **Active Columns** list.



- **Filters:**
Reports can be filtered by **Prospect #** or by the **Salesperson** assigned to the prospect. The **Prospect Selection** and **Salesperson Selection** dialog boxes will display the current options when you click the search icon.  Examples are shown below.

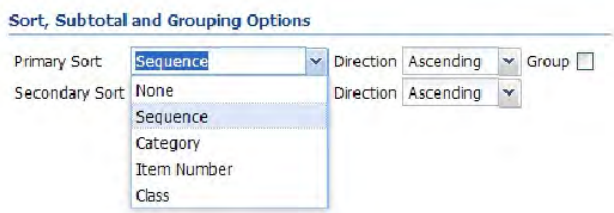
Prospect List report Filters.





- **Sort, Subtotal and Grouping Options:**
  - **Primary Sort** and/or **Secondary Sort** fields
  - **Direction** - Sort in ascending or descending order.
  - **Group -** Check the box to group by the **Primary Sort** field.

Prospect Guide report's Sort, Subtotal and Grouping Options.



How to Save a Custom Report Configuration

1. Create your customized report configuration using the column manipulation information detailed above.

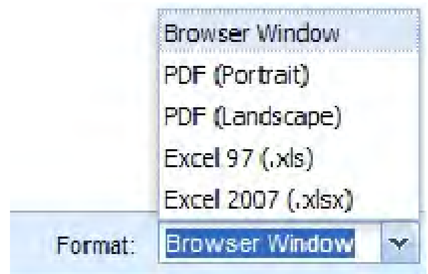
2. Then type a name in the box next to **Save Configuration** at the bottom of the screen.

3. Click the **Save Configuration** button.

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

Format Options

You can specify how your report should be generated using the "**Format**" drop down list in the bottom right section of the **Reports** screen.



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

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

- When report format **Excel** (97 or 2007) is selected a new tab will open in your browser.

    - If you do not have the Excel software loaded on your computer you will need the Excel Reader. Click the link provided on the page to download the Excel Reader before proceeding.

    - The Excel report link will appear in the lower right corner of your browser window.

    - Click the link and the report will open in the Excel Reader.

    - Use the Excel menu to print the report and save a copy on your computer.

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

18.1 Report Samples

Reports to Manage Prospects

- **Prospect Listing Report**

Displayed is an example of the Prospect Listing in the Browser report format. This example of a **Prospect Listing** report is sorted by **Prospect No.** and includes the City and State for each prospect. This report was generated by using the saved report configuration “City-State”.

Note By checking the **Converted Date** column you see that some prospects have not been converted to customers yet.

Prospect Listing
Generated on 07/28/2016 at 01:50PM EDT

[TESTING] Fran
168 Boston Post Road
MADISON, CT 06443

Prospect No.	Sales No	Status	Company	Contact	Phone	Created	Converted Date
1	CA	Active	NOTTY PINE DELI	VICTOR FRANKARD	203-453-3343	11/22/2016	
2	CA	Active	FAMILY PLACE RESTAURANT	JACK O'BRIAN	203-478-3421	02/22/2016	
3	CA	Converted	HAPPY MOON DELI	LI MOON	203-488-7054	02/22/2016	04/18/2016
4	CA	Converted	LITTLE GIANT GROCERS	JANE MEADOWS	203-453-1903	02/22/2016	04/26/2016
5	CA	Active	SEASONAL DELIGHTS	ROSIE KING	203-245-2706	02/22/2016	
6	CA	Active	SURFS UP SNACKS	TOM SHAGMAN	203-934-5467	02/22/2016	
7	CA	Converted	FOOD PALACE RESTAURANT	SHAH KHANAVISH		02/22/2016	04/18/2016
8	CA	Active	SUPREME SEAFOOD	AVERY CAPRIO	203-488-7673	02/22/2016	
10	CA	Active	TAFT'S PUB	GEORGE TAFT	203-467-7846	04/16/2016	

- **Prospect Guide Report**

When you create prospect guides you can print each prospect’s guide individually using this report. This example of a **Prospect Guide** report is sorted by **Item Number** and includes **Unit Price**.

SUPREME SEAFOOD
789 FOXON ROAD
NORTH BRANFORD, CT 06512

Prospect Guide
Generated on 07/28/2016 at 01:57PM EDT

[TESTING] Fran
168 Boston Post Road
MADISON, CT 06443

Seq	Item Number	Description	Class	Brand	Unit Meas.	Pack Size
1	20100	BEEF GROUND 81/19	BEEF	TYSON	CASE	8/10#
2	30305	VEGETABLE OIL CLEAR FRY	OILS	PARADE	CASE	35#
3	10339	FRIES SHOESTRING MCCAIN	FRENCH FRIES	MC CAIN	CASE	6/4.5#
4	10117	CHICKEN STRIPS BREADED	FROZEN CHICKEN	PARADE	CASE	1/10#
5	10105	CHICKEN NUGGETS	FROZEN CHICKEN	PARADE	CASE	1/15#
6	20512	SHRIMP 26/30 HEADLESS	SEAFOOD	PREMIER	BOX	1/5#

- **Customer Account Listing Report**

In this report you can configure it so you can see the last date and time the account was logged into.

Customer Account Listing

Generated on 07/28/2016 at 01:39PM EDT

[TESTING] Fran
168 Boston Post Road
MADISON, CT 06443

Cust No.	Ship Company	Account Username	Account Password	Account Email	Account Last Login Date	Account Last Login Time
ANN10	ANN SAND ENTERPRISES	ann10	ann10	frances@necs.com	03/14/2016	11:34:30 AM
ANN20	ANN'S KITCHEN	ann20	ann20	fran@necs.com	03/14/2016	11:34:30 AM
ANN30	ANN'S RESTURANT	ann30	ann30	frances@nces.com	03/14/2016	11:34:30 AM
ANN40	ANN'S SUPERMARKET	ann40	ann40	frances@necs.com	03/14/2016	11:34:30 AM
ANT10	ANTHONY'S FISH HOUSE	afh10	tony	frances@necs.com	03/14/2016	11:34:30 AM
BBQ10	THE BAR-B-Q PITT	bbq10	bbq10	frances@necs.com	03/14/2016	11:34:30 AM
DEV10	DEVRO DINER	devro	devro	frances@necs.com	03/15/2016	10:42:04 AM
FPAL01	FOOD PALACE RESTAURANT	foodpal	foodpal	frances@necs.com	03/14/2016	11:34:30 AM
HMON01	HAPPY MOON DELI	happy	happy	fran@necs.com	03/15/2016	12:27:31 PM

Chapter 19

Tips for Obtaining Product Images

19 Tips for Obtaining Product Images

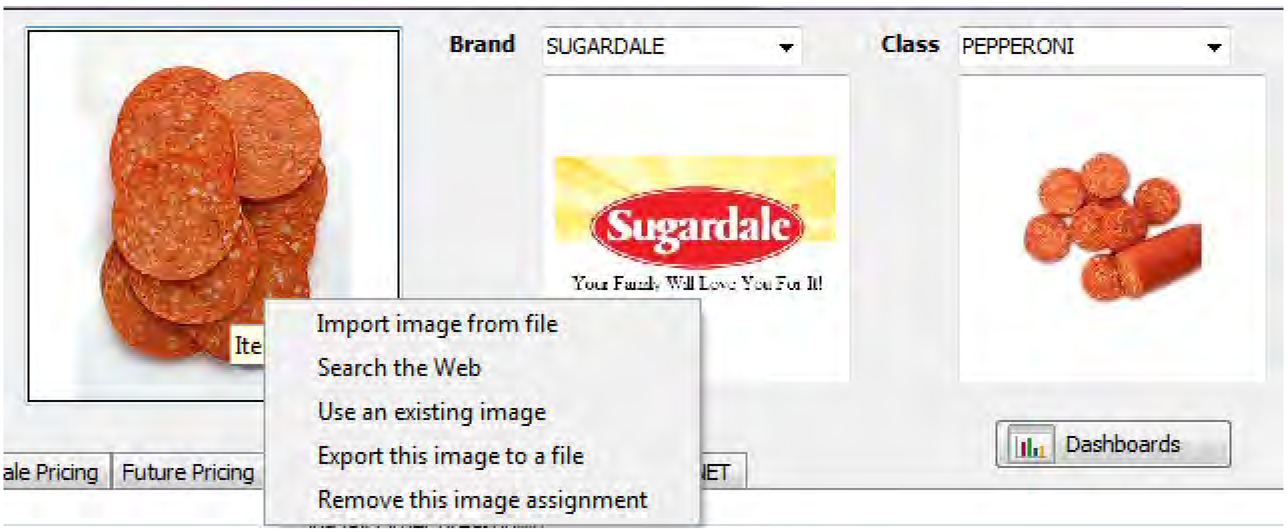
Sources for Product Images in entrée.NET

Customers like to see what they are buying and using images in your catalog will make it more visually appealing to customers visiting your website. If you would like to add images to your inventory items in the main **entrée** system that will display in your **entrée.NET** product catalog and specials you have a few options. Images can be found in your **entrée** system, using search engines and websites on the internet, in product manufacturer's websites or take your own pictures of products in your warehouse.

entrée V4 SQL

In the **entrée V4 SQL** system you have the ability to assign an image to an item, class, brand and customers. Images of the products that are being sold can be viewed while invoicing or displayed on a price list report that is sent to one of your customers.

Here you see the images section of the Inventory screen with the item image right-click menu options.



- Use the **Brand**, **Manufacturer** and **Class** options in the **Inventory** ribbon menu to manage those images.
- Use the **Customer** option in the **Customer** ribbon menu to manage their images.

The imaging system in **entrée V4** stores the actual images within database files. Images that are assigned to customers, brands, manufacturers and items can be uploaded to **entrée.NET**.

Although images of any resolution are supported, it is recommended to use 640x480 resolution to save hard disk space and the amount of time it takes to upload the images to the **entrée.NET**.

- **To assign an image to an item when the image is not assigned yet.**

1. Right-click in the item image box to open the **Right-Click for Options** menu.
2. Make a selection from these options to add or replace an image: **Import Image from File**, **Search the Web** and **Use an existing image**. Follow the steps for each process below.
3. Run the **Export to entrée.NET** and the item will display the images in the website.

- **Import Image from file**

1. If you select **Import Image from File** the dialog will open.
2. On your computer or network find the image file and select the saved image.
3. Click **Open**.

4. The **Image Preview** screen will display where you can confirm the import of the image for the item, brand, class, or customer. 5. Click the **OK** button to confirm the image assignment.
6. Click **Apply** in the Inventory screen to save the image on the item.
7. Run the **Export to entrée.NET**

• Search the Web

Use the **Search the Web** option when you choose to search the Internet for images that can be associated with your inventory items. You can search by Brand and/or Description and/or UPC or use the "Limit search to" option.

1. When you select the **Search the Web** option the Internet Image Search dialog will run an initial internet search using the item's Brand and Description. These search results will be displayed when the dialog opens for the first time.
2. Search results are displayed so you can page through using the Next and Previous buttons.
3. If no desired images are found or you encounter a message like "**This image could not be downloaded from the source server. Please try another image.**" make another image selection or search again using different search options.
4. Click the image to selected it and the **Image Preview** dialog box will display.
5. Click the **Select** button in the **Image Preview** dialog to download the image.
6. Click the **Apply** button.
7. Run the **Export to entrée.NET**

• Use an existing image

In the event that you already have an image saved in the system that you want to use for the items, like when you create case and piece items for a product, you can use this option.

1. When you right-click on the item image area and select the **Use an existing image** option the ImageSelectFrom dialog opens.
2. Scroll through the database of existing images and select an image. The selected image will display in the **Preview Area** on the right.
3. Click the **OK** button and the item image will update.
4. Click the **Apply** button to save the image.
5. Run the **Export to entrée.NET**

- For more information about image assignment go to the **entrée V4 SQL KnowledgeBase** Inventory File Item Information area topic.

entrée V3

Wherever you find your product images you will be saving these image files in a folder on your computer. Then by using the **Inventory Maintenance Misc2** tab in the main **entrée V3** system you will assign images to inventory items. For more information about image file installation and image assignment see the “Installing the Image Files” and “Assigning Images” chapters in the **entrée V3 Knowledgebase** in our website.

Assigning V3 System Images

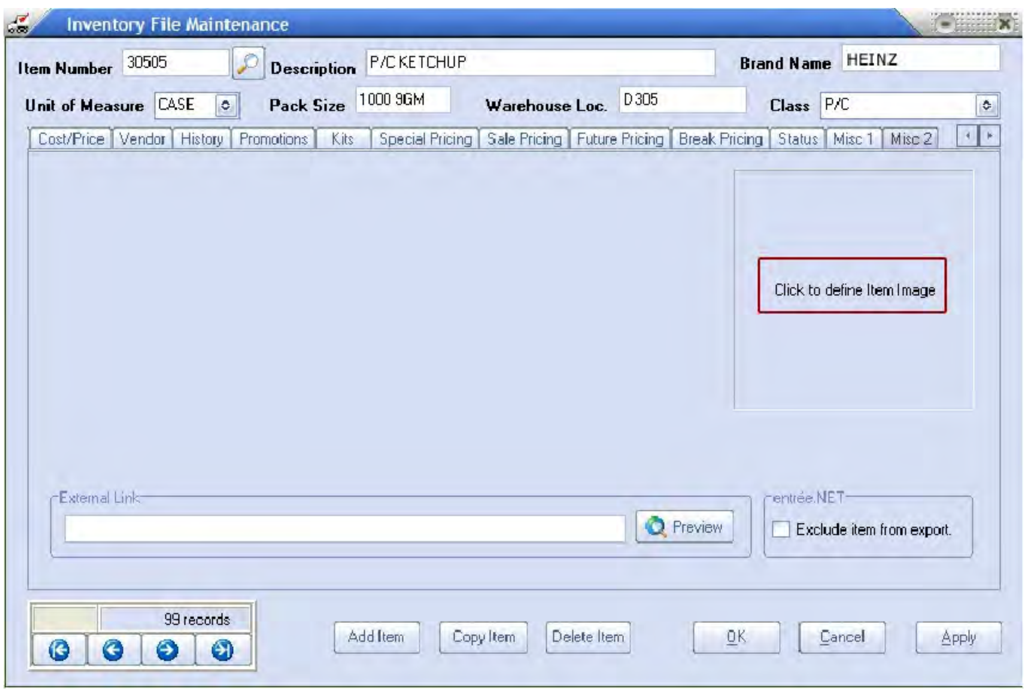
Your first option is to use the stock item images installed with your **entrée V3** system. These image files are ready for you to assign to your inventory items. Note that these images are not specific to a manufacturer, brand or product line. If you want am image of a particular brand item you will have to use one of the other sources described later in this chapter for those images. The stock images are located in the C:\necs\images folder on your computer and were installed with your **entrée V3** system software.

- **Follow these steps to assign images for items in the Inventory File Maintenance Misc2 tab in entrée V3.**

1. Log in to the main **entrée** system and use menu path: **File > Inventory Maintenance**.

2. Click the magnifying glass to find the item.

3. Click the “**Click to define Item Image**” link (outlined in red in the image below).



4. The **Select Image** dialog box will display.

   a. If you installed the image files during your **entrée** system installation process you will be able to scroll through the stock images list to find an image. Select the image and click **OK**. Then click **OK** in the **Misc2** tab.

   b. If you have images you found on the Internet or created with a camera and saved in a folder on your computer follow this procedure to import images:

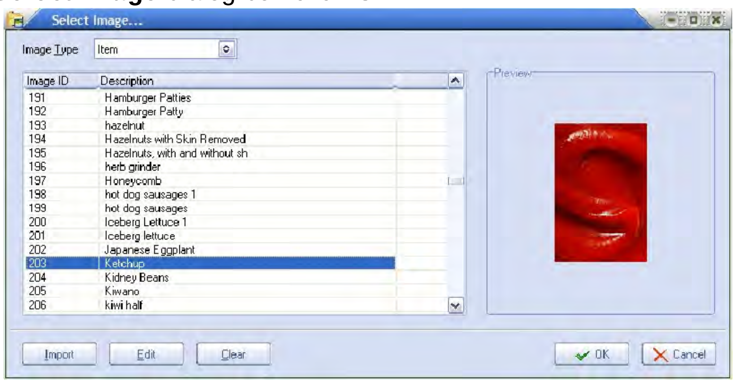
      i. In **Select Image** click the **Import** button.

ii. The **Import Image** dialog box displays. Select **Item** from **Image Type**, and then click the "**Click to define**" link.

iii. The **Load Image** dialog box displays. Now locate the folder and select the desired image file and click **Open**.

iv. The image will display in the **Import Image** dialog box.

v. In the **Select Image** dialog box click **OK**.



5. Then you will return to the **Misc2** tab click **OK**.

6. The next time you run the **Export to entrée.NET** the item will have the image for display.

7. If you want item images to display in **entrée.NET** check that option in the **Settings** tab > **Options** > **General** section that "**Display item images**" is set to **Yes**.

19.1 Finding Product Images

In the previous example a generic image of ketchup was used for the item image. In the event that you would like to show the actual product image and brand label you will have to
explore one of these other options; using a search engine on the internet to find an image that does not violate a copyright, visit the product manufacturer's website or take your own pictures of the product. We have included a section at the end of this chapter on Copyright Law Basics with a link to more information about the topic.

Please refer to these links before you search for your product images:

- Google Features Usage Rights - http://www.google.com/support/websearch/bin/answer.py?hl=en&answer=29508
- Google Advances Image Search - http://images.google.com/advanced_image_search
- Find Creative Commons images with Google Image Search - http://googleblog.blogspot.com/2009/07/find-creative-commons-images-with-image.html
- Creative Commons.org – Use this site to find licensed works http://creativecommons.org/

Using Google Images Advanced Search

• Google Images Copyright and Image use Permissions

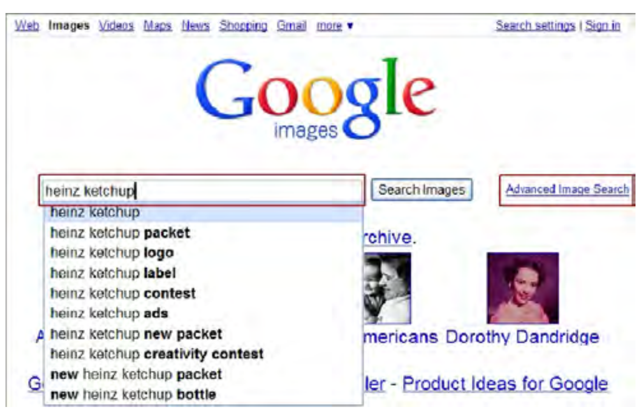
The images displayed in a Google Image Search may be protected by copyright, so we can't grant you the right to use them for any purpose other than viewing them on the web. If you'd like to use images from an image search, we suggest contacting the site's webmaster to obtain permission and use the **Usage Rights** filtering feature in an Advanced Image Search.

• How to find product images using Google Images

1. Use your Internet browser and go to **images.google.com**.

2. Type what product you are searching for in the **Search Images** text box.

For this example we used Heinz ketchup to find a brand name image instead of the stock ketchup image used previously in this chapter. As you can see in the image below a list of possible search topics will be presented. You can make a selection from this list.

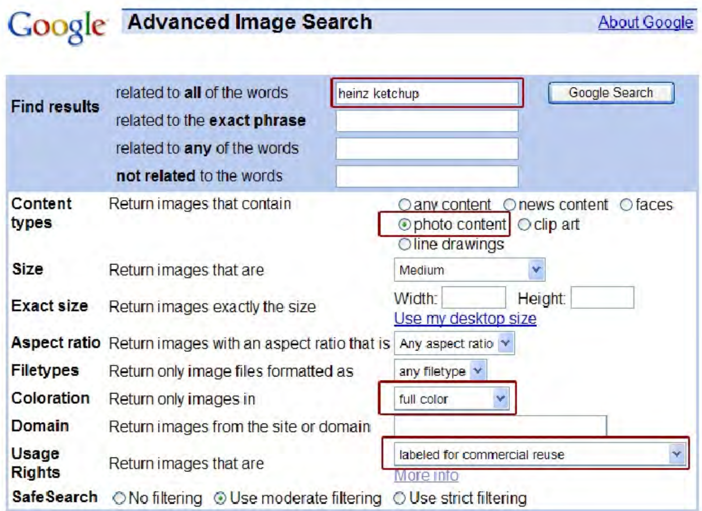


3. Click the **Advanced Image Search** link on the right. The advanced image search page will be displayed. For better search results try these options in **Advanced Image Search:**

   - **Find results -** This field will be populated with the search text entered above.

- **Content types –** Select **photo content**.
- **Size –** You can select any size you like but the final image used must be edited to 640 x 480 or less for upload.
- **Coloration –** Select **full color**.
- **Usage Rights -** Select one of the following options from the drop down list:
  - Labeled for commercial reuse
  - Labeled for commercial reuse with modification

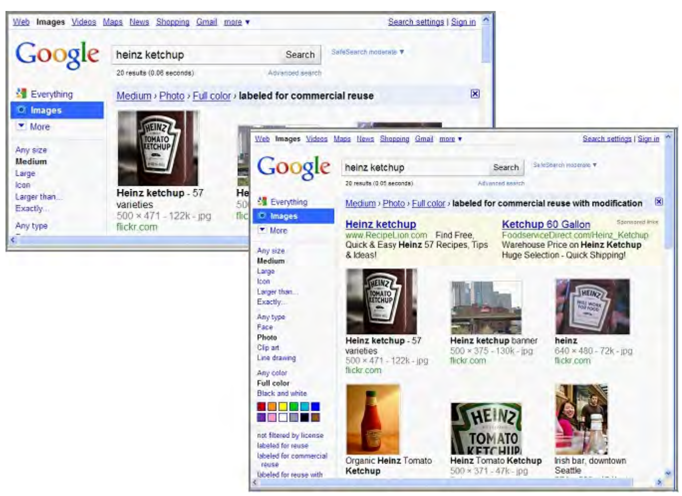
4. Click the **Google Search** button to get your search results.



©2010 Google

Search results for images of Heinz ketchup.

Top: Usage Rights set to **Labeled for commercial reuse.**
Bottom: Usage Rights set to **Labeled for commercial reuse with modification.**



5. Click on the desired image format link. For example the Heinz ketchup 57 varieties jpg link. Note the image's size because you will need to resize any large images to 640 x 480 for use in your system. The image will open in your browser.

6. Right click on the image and select **Save Picture As** from the options list.

7. The Save Picture dialog box displays. Select the folder on your computer where you will store your product image files.

8. Click **Save**.

9. Then follow the instructions in step 4 of the **Assigning entrée System Images** section above to import and assign the image to an item in **entrée.**

Source: [http://w w w .google.com/support/w ebsearch](http://www.google.com/support/websearch)

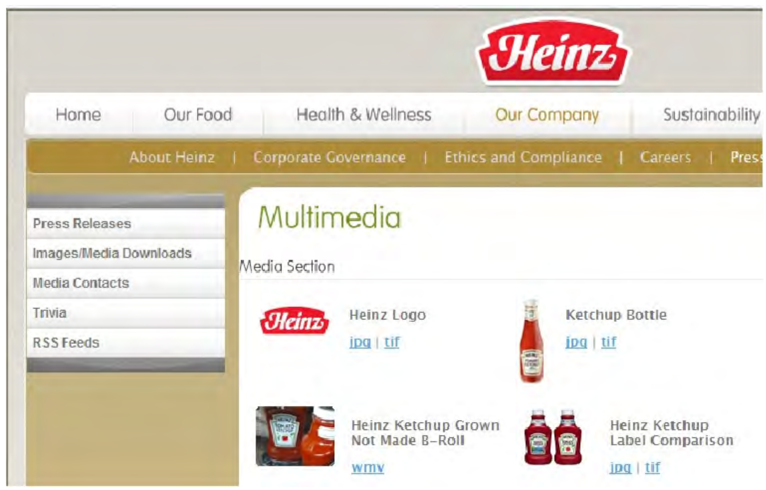
Visiting the Product Manufacturer's Website for Images

Frequently major manufacturers have images available in their websites for the media and businesses to use without any cost. There are usually restrictions about how the images are used and modifications of these images are typically not allowed. Follow these tips to find those manufacturer's images.

1. Select a product check the label for the website information or use a search engine to find the website.

2. Once in the web site look for these keywords like these in their website menu; Press Room, Public Relations, Media, Images, Media Downloads, Image Library, Multimedia Assets.

3. In our ketchup example we went the manufacturer's website and found their Press Room Media Assets page with a collection of images.



4. Follow any download instructions on the website. Be sure to take note any information about copyright and instructions on the reuse of these images.

   If there are no instructions on the website:

   - Click on the desired image format link. For example the Ketchup Bottle jpg link in the center of the Heinz ketchup image. The image will open in the browser.
   - Right click on the image and select **Save Picture As** from the options list.
   - The Save Picture dialog box displays.
   - Select the folder on your computer where you will store your product image files.
   - Click **Save**.

5. Then follow the instructions in step 4 of the Assigning entrée System Images section above to import and assign the image to an item in **entrée.**

Note **It is your responsibility to make sure you do not violate the manufacturer's copyright.**

19.2 Taking Your Own Pictures

Using a digital camera you can take pictures of the products in your warehouse that can be imported into the **entrée** system. When you take your own pictures you own the images and can control what is in the picture uploaded for a product.

Although images of any resolution are supported, it is recommended to use 640 x 480 resolution to save hard disk space and cut down on the amount of time it takes to upload the images to your **entrée.NET** system.

1. Create a folder on your computer called “Product Images”.

2. Once you have taken product pictures with your digital camera drag and drop or copy the image files from your camera SD card to your Product Images folder.

3. Now you need to edit the images in whatever photo editing software you have on your computer. Try to crop the picture so only the product is in the image. Be sure to resize images to 640x480.

4. Save the edited image files with a descriptive name, for example; Heinz ketchup bottle or Heinz ketchup packets. This way it will be easy to match the images with your items.

5. Then follow the instructions in step 4 of the Assigning **entrée** System Images section above to import and assign the images to an item in **entrée.**

6. The next time you run the **Export to entrée.NET** the item will have an image for display.

Hot Tip! If you want item images to display in **entrée.NET** check that in the **.NET** system the **Settings** tab > **Options** > **General** section that “**Display item images**” is set to **Yes**.

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