



# Product Features



# 1 entrée.DSR Product Features

## Laptop Software for Remote Order Entry & more for your DSRs

The **entrée.DSR** software module is designed to run on a standard Windows based laptop. It will make the job of your salespeople easier, while making your food service operation more profitable. Your DSRs (Distributor Sales Representatives) will be more productive as your customer relationships drastically improve. The purpose behind our creation of **entrée.DSR**, was to provide an extension of your **entrée** software, which would run on a laptop or netbook computer, to give your DSRs the tools they need, without having to be connected to your company's server.



Some **entrée.DSR** features include:

- Your DSRs are no longer simply order takers.
  - Quickly enter customer orders with our "standard order process".
  - DSRs can optionally view gross profit as order is entered.
  - DSRs can see commission increase/decrease as prices are adjusted.
  - Eliminates office errors on orders from miscommunications.
  - Eliminates time for office staff to key in orders.
  - Pass on special instructions to the office and warehouse.
  - View detailed customer buying habits.
  - View latest inventory on hand quantities.
  - Remind customers about products that should be ordered.
  - Produce on-the-spot quotations and credit memos.
  - Review the customers outstanding accounts receivable.
  - Generate Price Lists.
  - Generate Customer Aging Reports.
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## How It Works

The **entrée.DSR** software communicates directly with the server in your office running **entrée** for either downloading important data (such as inventory, accounts receivable, etc.) or transmitting customer orders, quotations, etc. It handles the communication by VPN (using an Internet connection), a direct connection to your network (in those instances when the DSR is in your office with their laptop) or a modem using a standard phone line, cell plan or wireless air card. All of the work accomplished by the DSR is stored locally on their laptop, and is transmitted when the DSR initiates a data transfer.

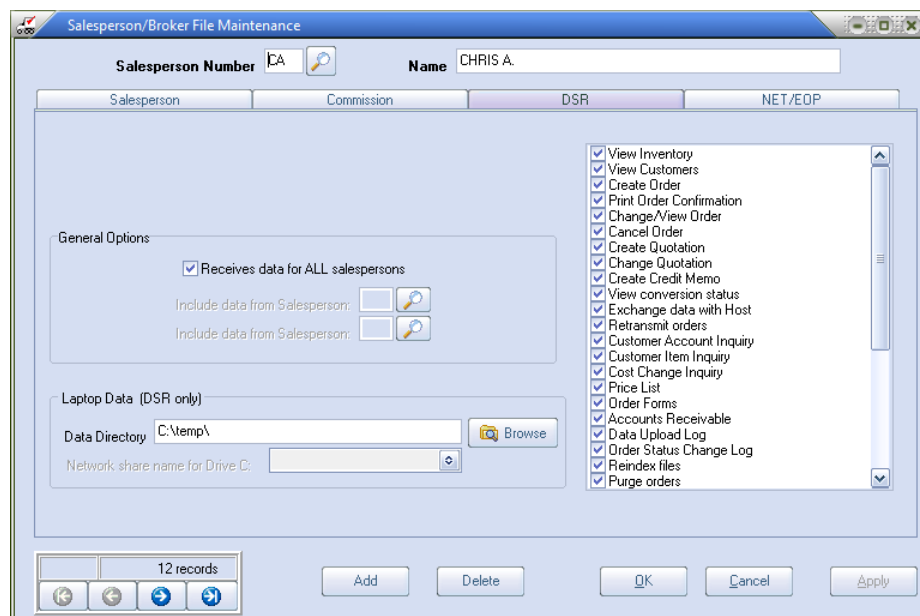
A designated workstation in your office can be put into "DSR Host Mode" where it waits to service remote requests from the DSRs, including uploading and downloading specific data including customer orders, inventory levels, costs, pricing, items, accounts receivable, credit hold customers, etc.

Most food distributors using **entrée.DSR** have their sales force receive at least one data transmission a day to update all the data on the DSR's laptop so that your DSRs can place orders with accurate information.



## DSR Salesperson Setup & Controls

The **entrée.DSR** system provides an extension of the data from your main **entrée** system, that your DSRs (Distributor Sales Representatives) need to deal with customers and place orders, without actually being connected to **entrée**. The first step when starting to use **entrée.DSR**, is to setup each of your salespeople that will use the system, and indicate the rules the system should follow for them using the **entrée** system Salesperson/Broker File Maintenance **DSR Tab**.



The **DSR Tab** has many features and controls which you can control for each DSR. This includes the viewing of inventory costs (Real, Base, Landed or Market) and profit margins, entering catch weights, requesting specific inventory lots, editing pricing and the ability to establish pricing below your defined "Minimum Sell Price". A DSR can also be defined as a "Sales Manager" which means they are provided all customer information, and not just their own.

## Creating Customer Orders

Your DSRs will be able to quickly create customer orders while having access to a wealth of information about each customer's buying habits and past purchases. They can see if the customer is on credit hold, over their credit limit, or has any other accounts receivable issues that should be dealt with before placing a new order.

If you allow, there is even a special hot key they can hit which will show them the orders profit margin by item and what their commission may be (out of the customers view). This allows them to make price changes and see the immediate results to the bottom line and their commission.

While creating an order, the Standard Order screen will display each of the items the customer regularly purchases and allow the DSR to quickly enter the quantity requested.

Note that as each item is displayed, key information about that customer's last purchase are shown, including last sale quantity, date and price.

You can even set the order in which items appear, in case your customer prefers to order items in a specific sequence. This is what the order entry screen looks like for your DSR.

## Standard Order Mode

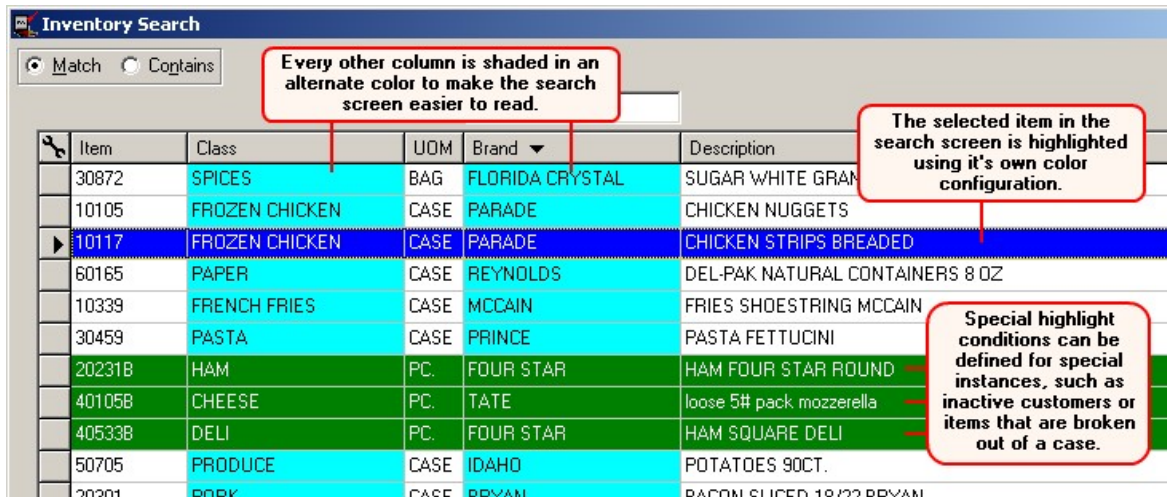
The Standard Order feature was designed to allow orders to be entered quickly, properly and efficiently. While creating an order, this screen will display each of the items the customer regularly purchases and allow the DSR to quickly enter the quantity requested. Each item is displayed with key information about that customer's last purchase including last sale quantity, date and price. You can even set the order in which items appear, in case your customer prefers to order items in a specific sequence. Even though your customers may quickly tell your DSR what they want to order, they can easily keep up the pace because of the simple and elegant design.

Item #	UOM	Description	Order Qty	Weight	Unit Price	Extended Amt
20301	CASE	BACON SLICED 18/22 BRYAN	5	0.00	40.8500	204.25
20414	CASE	CHICKEN WINGS	0	0.00	1.0700	0.00
30001	CASE	KETCHUP BTL HEINZ	0	0.00	25.6000	0.00
30206	CASE	MAYONNAISE PARADE H.D.	4	0.00	16.3200	65.28
30459	CASE	PASTA FETTUCINI	0	0.00	14.8200	0.00
30600	CASE	PICKLES 1/2 GAL PAUL SLICED	1	0.00	14.0100	14.01
60106B	PC.	loose pack: paper bags 8oz	0	0.00	9.7000	0.00
10500B	PC.	loose pack: broccoli spears	0	0.00	1.7000	0.00

The primary goal of this feature is to help your DSRs sell more product while preventing customer call backs with add-ons to their order. Here the DSR can quickly determine any items that are being skipped. This provides the opportunity to ask the customer about those skipped items, and prevent order add-ons or other emergencies.

### Search Screens

In your DSR's fast paced world, finding an item, customer, lot number, etc. quickly and easily is of critical importance. The **entrée.DSR** system has a powerful search system, which is easily configurable to your exact needs. Our search system can instantly find information in databases containing tens of the thousands of entries. Searching can look for an exact match or use our 'contains' feature to find partial matches.



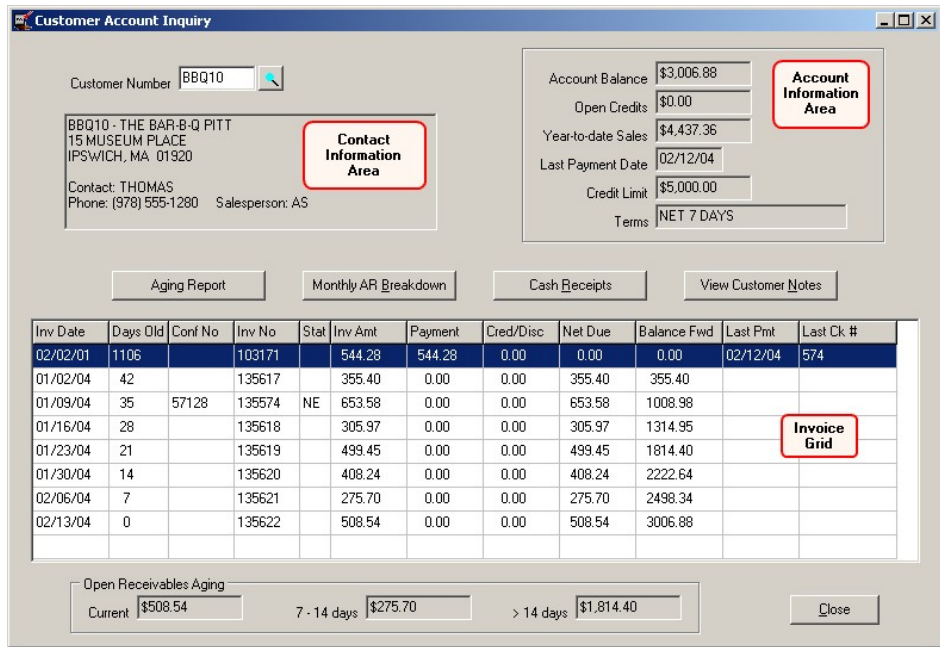
For example, the 'contains' feature is useful if the DSR doesn't know exactly how an item's description was entered. Just enter any keyword, and no matter where it falls in the item's description, those matches will be instantly displayed.

### Customer Account Inquiry

The Customer Account Inquiry screen allows your DSR to quickly see a summary of a customer's account status. They can also view this information when creating or changing an order. All of the open invoices of a customer as well as the paid invoices of the current period are displayed.

Besides clear and instant access to a customer's accounts receivable status, this screen also provides the ability to display:

- Month and year-to-date sales breakdown.
- Detailed cash receipts breakdown.
- View Customer Notes.
- Monthly accounts receivable breakdown.
- Ability to generate an Aging Report for the customer.



## Customer Item Inquiry

Your DSRs will have access to the 'Customer Item Inquiry' screen which allows them to view all the products a particular customer is buying.

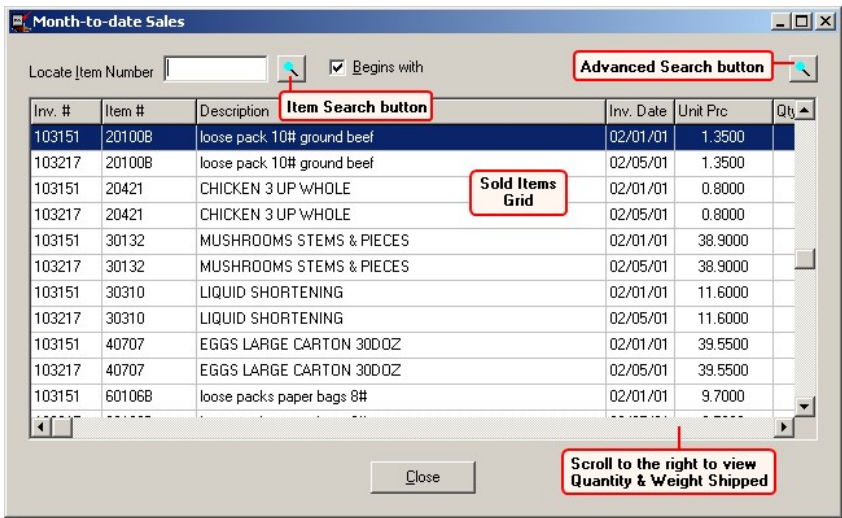
- Key information such as Quantity Purchased, Last Price, and Last Purchase Date is conveniently displayed in the Item Grid.
- DSRs can clearly see the last time the item was purchased and how much that customer paid for it.
- Additional information for the selected item, such as the current price, is displayed at the bottom of the this screen.
- Clicking the 'Expand Grid' button will enlarge the item grid to fill the entire window. This allows the DSR to see more items at once, without having to scroll up or down in the item grid.

## MTD Sales

The Month-to-Date Sales window allows your DSR to view the customer's sales history during the ordering process.

This feature allows them to quickly locate a previously purchased item or gain an insightful overview of the customer's purchasing tendencies.

If an item is selected from this screen, it will automatically be placed on the customer's order.



## Printed Order Confirmation

After the DSR completes the order, a 'Confirmation Number' will be assigned to the order, and they will be allowed to print an 'Order Confirmation'. This document will show the customer all of the items that have been ordered. You have the option of showing pricing as well as an 'Estimated Total'. After this step, the order can be immediately transmitted to your main **entrée** server, or be saved to be transmitted at a later time.

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Page No. 1
ORDER CONFIRMATION
FOOD DISTRIBUTION COMPANY INC.

Customer No: F0U10
FOUR STAR SEAFOOD HOUSE
551 FRANKLIN ST
TOPSFIELD, MA 01985
(978) 555-1490

Confirmation No.
10002

Delivery Date: 02/06/04

Item No.  UOM      Item Description      Brand Name  Pack Size  Qty Ord
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20306    CASE  BACON SLICED 18/22 LAYOUT 20#  BRYAN      1/20#      2
20658    CASE  SAUSAGE FRESH ITALIAN*  LAURENTS   5#          1
30001    CASE  KETCHUP BTL HEINZ      HEINZ      24/14OZ.   2

Page 1 of 1
  
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### Customer Worksheets

The entrée.DSR system allows for multiple styles of print for Customer Worksheets, which act as order forms.

These different styles have different looks and features, depending on your needs.

The purpose of these worksheets is to list all of the items the customer normally purchases, their current pricing, and allow them to keep track of their purchases and inventory usage.

<b>FOOD DISTRIBUTION COMPANY INC.</b> 123 Main Street Plainville, NY 12345 Customer: DAIQUIRI HOUSE #2		<b>CUSTOMER WORK SHEET</b> ***** Tel: (800) 555-1200 Fax: (900) 555-1201		Day: Entire Week Date: / / Order #: 1035					
Signature: _____									
Item Number	Qty.	Unit of Measure	Pack Size	Brand Name	Description Line 1	Item Avg. Weight	Act. Qty.	Unit Price	Ext. Amt.
10117		Case	1/10#	PARADE	CHICKEN STEEP BREAD	0.00			29.65
10210		Case	6/6#	LAMP TRISTO	SUBSETTE SUPERDIP SH	36.00			22.00
20512		Box	1/5#	FISHICH	FRD DRP 16/20 REABLES	5.00			7.55
20841		Bag	1/25#	SEEDALS	SALT TINE	0.00			5.50
30210		Case	2#	BEST	TOMATOES SKW	0.00			22.25
60146		Case	10/100	MINCUP	LIDS 36L3- 12,14,16.	0.00			13.00
70171		Case	6/16AL	PARADE	BLEACH	0.00			7.07
7018F		Case	6/16 OZ	PARADE	STAINLESS STEEL CLEA	0.00			22.47
RETURNED GOODS									

### Reporting Features

Your DSRs will love the many reports they can generate. All reports can be fully customized to provide control over data fields, data field order and filtering, as well as sorting and grouping on select fields.

Multiple filters can be defined per report to give your DSRs the exact info they need. Included reports include the Price List, Order Register, Customer Mailing Labels, Customer Accounts Receivable, Customer Order Forms and many more.

This includes specifying which data fields to use as columns, whether pricing should be shown, sorting and grouping, etc.

Most importantly, they can be specifically generated for individual customers, showing proper pricing, etc.



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