

entree[✓].DOT

Software for the Food Distribution Industry

System Guide



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Chapter 1

Introducing entrée.DOT

1 Introducing entrée.DOT

The [entrée.DOT](#) software add-on module was designed for NECS [entrée V4 SQL](#) and [entrée V3](#) users who purchase from [Dot Foods](#), the nation's largest food re-distributor. If you currently use the Dot Expressway web site for your ordering, etc., you will find that this module compliments it and makes some processes easier and faster. It allows [entrée](#) users to automate procedures related to costs, pricing, purchasing and receiving, along with the ability to make your entire order guide from Dot Foods available to your customers.

Items purchased from Dot Foods can be integrated into the NECS [entrée](#) system providing you the ability to drastically increase the number of products you can supply to your customers – without having to increase the size of your warehouse. The items in the Dot Foods catalog that are not normally stocked by the distributor can be sold as either a “special order” or “drop ship” item and are pre-ordered on an invoice. Special Order items are delivered to the distributor with their regular Dot Foods delivery. Drop Ship items are delivered directly to the customer from Dot Foods, usually via FedEx with additional shipping charges.

All items purchased from Dot Foods will flow into your [Electronic Order Pad](#) iPad application and [entrée.NET](#), to provide you with more selling opportunities.

[entrée.DOT](#) is designed to save you time, so that all of your cost, pricing, purchasing, receiving and inventory updates from Dot Foods internal computer systems are handled within your [entrée](#) software by means of Internet based FTP data transmissions. Existing purchases with Dot Foods are streamlined and more efficient. Purchase Orders are submitted electronically and the Dot Foods catalog can be regularly imported into [entrée](#) to reflect current pricing.

Besides the features built into the [entrée](#) system software you will want to access the [Dot Expressway](#) website to search their catalog, track purchases, generate reports and more.



Offering Complete Integration of the Dot Foods Database

The [entrée.DOT](#) software module is designed for NECS [entrée](#) users who purchase from Dot Foods, the nation's largest food re-distributor. If you currently use the Dot Expressway web site for your ordering, etc., you will find that this module compliments it and makes some processes easier and faster. It allows [entrée](#) users to automate procedures related to costs, pricing, purchasing and receiving, along with the ability to make your entire order guide from Dot Foods available to your customers. Items purchased from Dot Foods can be integrated into the NECS [entrée](#) system providing you the ability to drastically increase the number of products you can supply to your customers – without having to increase the size of your warehouse. All items purchased from Dot Foods will flow into your [Electronic Order Pad](#) iPad application and [entrée.NET](#), to provide you with more selling opportunities. This module communicates directly with Dot Foods internal computer systems via Internet based data transmissions.

Managing Your Dot Foods Items

The Dot Management Sales Review screen is used to view pending sales and provide a historical view of the sales of your Dot Foods catalog items. This powerful screen allows you to easily observe which products are selling well and use this information to adjust the items you import from the Dot Foods catalog. Make changes to Special Order Items on customer invoices. Edit invoices, sales orders, and/or purchase orders associated with the selected line item. Print invoices, loading sheets, sales order confirmations, sales order loading sheets, sales order releases, and/or purchase orders associated with the selected line item. Properties, Filters and Columns help you easily find items or groups of items you are looking for.

Defining Dot Foods Preferences

The **entrée.DOT** interface allows you to define preferences as to how your **entrée** system will interact with Dot Foods. This includes defining how Special Order Items and Drop Ship Items should work, including your default price markup percent, lead time and required customer deposit percent. You can also enable Special Order and Drop Ship items to automatically flow into your **entrée.NET** and **Electronic Order Pad** applications, as well as overriding these settings on a per item basis.

Integrate 30,000+ Dot Food Items with your Inventory

When using **entrée.DOT**, a new tab is added to Inventory File Maintenance which will display key information from the Dot Foods item catalog. A Control Panel feature is included to help you track all the details as imported from the Dot Foods Catalog. Key values, such as UPC Code, Cubes, Pallet Information, Gross Weight and Manufacturer Item Number will automatically be updated. You can define if the item is sold as a Special Order, Drop Ship item along with the lead time and other important details.

Inventory Search Screen

The Inventory Search Screen includes a Dot Foods button in the lower left, which toggles the inclusion of Dot Foods items ON or OFF. This is an important feature because when searching for an item, you may or may not want Dot Foods items to be included with your normal items. And when you can import anywhere from 30,000 to over 100,000 items from the Dot Foods Catalog, having all these extra items can make searching more of a challenge. This feature makes the huge volume of these additional items much more manageable to deal with. Note that Special Order Items are displayed with orange text and Drop Ship Items are displayed with brown text in the Inventory Search Screen.

Automates Your Purchase Orders to Dot Foods

The Dot Foods interface works with **entrée** to make it fast and easy to create Purchase Orders for your Dot Foods items. When manually creating a Purchase Order in **entrée** for a Dot Foods vendor, a message box will display if there are open pre-order items that should be included based upon customer invoices. The "Dot Special Order Item Selection" dialog will display so you can select the items you want to add to the Purchase Order. You can click on the item to see the customer who ordered the item in the upper left. Select all the desired Dot Foods items and they will be automatically added to the Purchase Order. With one click the Purchase Order will be electronically sent to Dot Foods. Note that any Drop Ship Items will be shipped to the Ship-To Address as defined on your customer invoice where the item was ordered.

Simple Pricing Updates

Once items from the Dot Foods catalog have been imported into **entrée** they must be kept up to date with new pricing. This task is easily accomplished by running the Update Dot Catalog and Pricing option on a daily basis. If your files are current a message indicating that there are no new files to import will be displayed, other-wise an update to the Dot Foods database is performed.



- Please visit our website at www.necs.com to learn about our other add-on modules, products and services.
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1.1 entrée.DOT Product Features

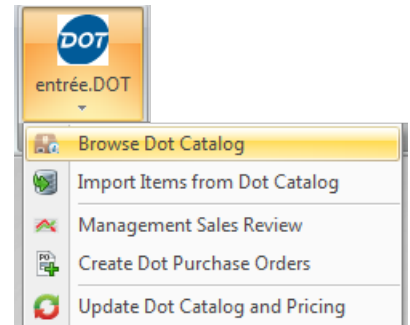
entrée.DOT Control Panel

The Control Panel is the heart of the Dot Foods interface. It is here that you can easily manage operations with Dot Foods from a single intuitive interface.

In **entrée V4 SQL** when you have the **entrée.DOT** add-on module the DOT option will be included in your **Add-Ons** ribbon menu to access the Control Panel menu.

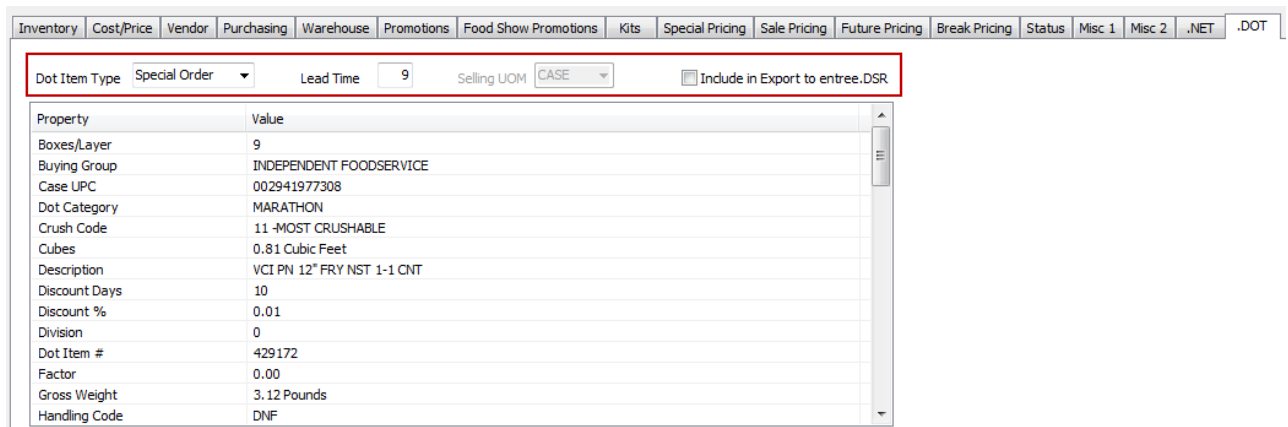
The **entrée.DOT** Control Panel menu provides all the functionality you will need to successfully integrate items from the Dot Foods catalog into your product line. Through the control panel you can:

- Browse the catalog and Import items from your Dot Foods Order Guide via a fully automated FTP process using your existing Internet connection.
- Use the Management Sales Review screen to view past and pending sales to determine product sales trends.
- Automatically build and export to Dot Foods your POs for Special Order and Drop Ship Items with options for date and vendor.
- Update item cost and price information for Dot Foods catalog items in a single click.

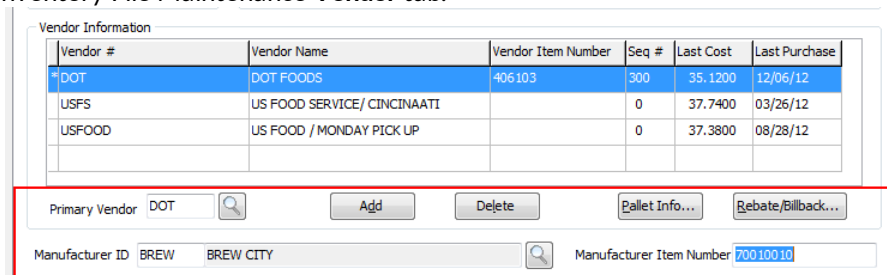


Inventory File Maintenance

A **.DOT** tab will be added to items in the Inventory File Maintenance only for Dot Foods catalog items. This tab will display all key information from the Dot Foods item catalog. Here you see the **entrée V4 SQL** Inventory File Maintenance **.DOT** tab.



entrée will determine if an item in the inventory file is a 'Dot Foods' catalog item by first determining if one or more of the vendors for the item are flagged as a 'Dot Vendor'. This is the Vendor Information section of the **entrée V4 SQL** Inventory File Maintenance **Vendor** tab.



The **entrée** system will then cross compare the assigned vendor item number to the item numbers in the Dot Food catalog file. If a match is found, the item is deemed to be a Dot Foods item. This methodology allows for all the existing items that are purchased from Dot Foods to be automatically linked with the operator having to perform any additional tasks.

Key values, such as UPC Code, Cubes, Pallet Information, Gross Weight and Manufacturer Item # will automatically be updated from the Dot Foods catalog when viewing Dot Foods items in Inventory File Maintenance.

Manufacturer File Maintenance

With the goal of tracking sales information properly, when purchasing from a master distributor such as Dot Foods, sorting by 'Brand Name' does not work because many manufacturers produce products under a variety of Brand Names.

The **entrée** Manufacturer File Maintenance subsystem allows you to define Item Manufacturers which can then be assigned to individual inventory items.

This feature recognizes that the vendor from whom you purchase a particular product may only be a reseller (such as Dot Foods) and not the original manufacturer of the product. The reporting system in **entrée** is updated to support the Manufacturer feature.

Search Screens

In **entrée V4 SQL** Special Order Items are displayed in orange text and Drop Ship items are displayed in brown text by default.

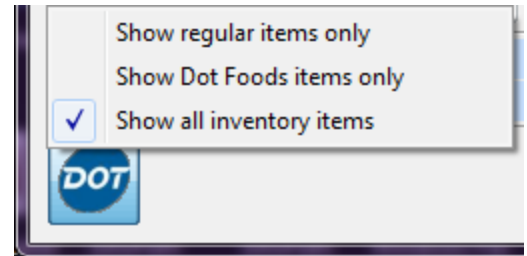
These colors can be customized for your business using the Tools button outlined in the Inventory Search screen.

Item #	UOM	Brand Name	Pack Size	Description	Onhand
BEEF, STEAKS, F					
396417	CASE	ADVANCE PIERRE	40/4 OZ	BEEF FLAT STEAK CHUNK FORMED 40	
BREADS & ROLLS					
51624	CASE	LABREA BAKERY F	1/72 CNT	BUN BRIOCHE 2.4 OZ OUNCE 72 COUNT	
CLOSE-OUT					
01764	CASE	CUSTOM CULINARY	8/16 OZ	CUS GYY-PNRST BRW MIX 8-16 OZ	
DOT FOOD					
0379783	EACH	VOLLRATH	1/1 CNT	LADLE STAINLESS STEEL KOOL TOUCH	
0429172	EACH	VOLLRATH	1/1 CNT	PAN 12 INCH FRY NON STICK 1 COUNT	
0483087	EACH	JACCARD	1/1 EA	SLICER MANDOLIN HAND HELD DUAL 1	

Prc Lev 1:	\$57.4100	Pack Size:	1/72 CNT	Real Cost:	\$36.8000
Prc Lev 2:	\$55.9200	Brand Name:	LABREA BAKERY F	Base Cost:	\$43.0560
Prc Lev 3:	\$53.8200	Onhand Qty:	0.000	Market Cost:	\$0.0000
Prc Lev 4:	\$52.5100	On Hand Wgt:	0.0000		

Use the **DOT** button in the **entrée V4 SQL** to customize your inventory searches.

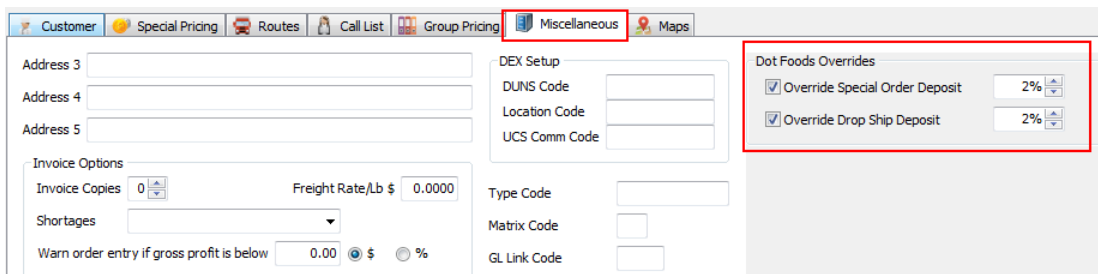
This feature can help you keep your regular day to day catalog items from being overshadowed by the numerous items from Dot Foods.



If you prefer, Special Order and Drop Ship items can be withheld from the Search Screens. If this is the case, these Special Order and Drop Ship items can only be accessed through a special function key.

Customer Deposits

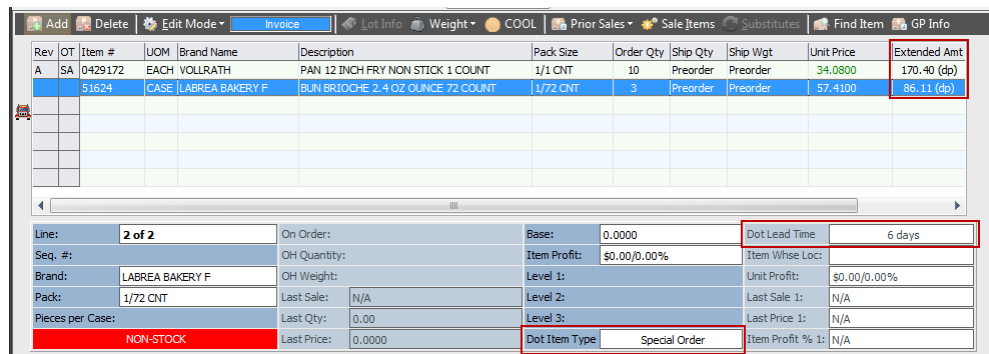
entrée.DOT allows for a deposit amount to be charged on the initial invoice when a special order or drop ship item is purchased by the customer. This deposit amount is then credited back to the customer's account on the final invoice when the product actually ships to the customer. The deposit setting can be overridden on a per customer basis in the Customer File Maintenance Miscellaneous tab.



Invoicing

When Dot Special Order or Drop Ship items are first added to the invoice, the 'Ship Qty' and 'Ship Wgt' values will be displayed as 'Preorder'. The extended amount for the line item will be the deposit monies that should be collected followed by a **(dp)** to indicate to the operator that it is a deposit. Gross profit, discounts and other service charges are never applied to the deposit amounts. They are only calculated or applied when the special order or drop ship product actually ships.

- The **Dot Lead Time** field will display the number of days that it typically takes to get the special order or drop ship item from Dot Foods.
- The **Dot Item Type** field will display if the currently selected item is a Dot Special Order or Drop Ship item.



• Invoicing Special Order Items

When a Special Order Dot catalog item is added to an invoice, **entrée** will calculate when the product should be received by the distributor based on the lead time assigned to the item.

If the current system date plus the lead time days is greater than the invoice date, the operator will be prompted that the item is a Special Order item and will be delivered on a future invoice. An approximate delivery date is displayed in the message dialog using a formula that considers the items lead time and the routing information defined in customer file maintenance. The date displayed should be the customers next scheduled delivery date after the product is received from Dot Foods.

When the initial invoice is printed, the original deposit amount that was charged, (indicated by a capitol letter 'D' for Deposit in the Extended Amount column), will be deducted from the extended amount.

ESTHER'S FAMILY DINER		ESTHER'S FAMILY DINER	
106 E ELM STREET		106 E ELM STREET	
UNION CITY, OH 45390		UNION CITY, OH 45390	
EST106	Verbal	21	1 (937) 899-0310 05/15/14 521386
			** Sub-Total ==> 0.00
==> The following SPECIAL ORDER items will be delivered on a future invoice <== (Extended Amount represents item deposit amount)			
0429172	10	1/1 CNT	PAN 12 INCH FRY NON STICK 1 CO 0 EACH 34.08 170.40D
51624	3	1/72 CNT	BUN BRIOCHE 2.4 OZ OUNCE 72 CO 0 CASE 57.41 86.11D

• Invoicing Drop Ship Items

When a Drop Ship Dot catalog item is added to an invoice, the operator will be prompted that the item is a Drop Ship item and will be delivered on a future date directly from Dot Foods.

An approximate delivery date is displayed in the message dialog using a formula that considers the items lead time from the current system date.

When the invoice is printed, the original deposit amount that was charged will be deducted from the extended amount.

Gross profit, discounts and other service charges are never applied to the deposit amounts. They are only calculated or applied when the special order or drop ship product actually ships.

Importing Dot Foods Items

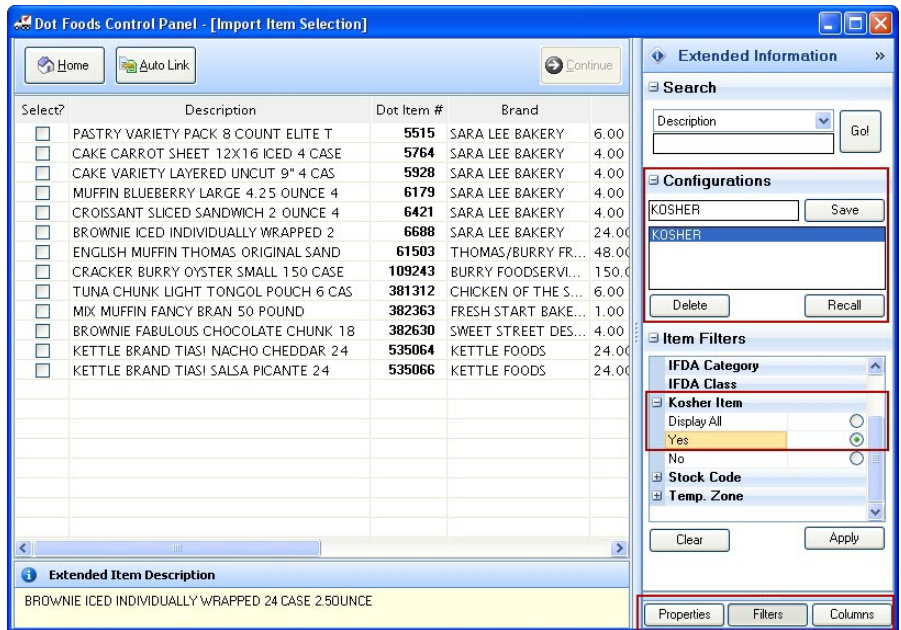
- Thinking about adding new product lines for your changing customer base?
- Do you want to add new brands to your catalog?
- Would you like to sell equipment to your customers?

The process to Import items into **entrée** from the Dot Foods Catalog displays the full Dot Foods Catalog so you can easily select new products to support your marketing strategies.

The **Properties** option allows you to view all the information about an item in the Dot Foods catalog so you can use the extensive information shown to determine if the item meets your business requirements and if you would like to add the item to your inventory database.

The **Filters** options provides a way to quickly sort through the catalog and pinpoint new items, brands, what-ever you need to support your business growth.

The **Columns** option allows you to focus on the specific item information that is important in your decision making process and removes the information clutter from the screen.



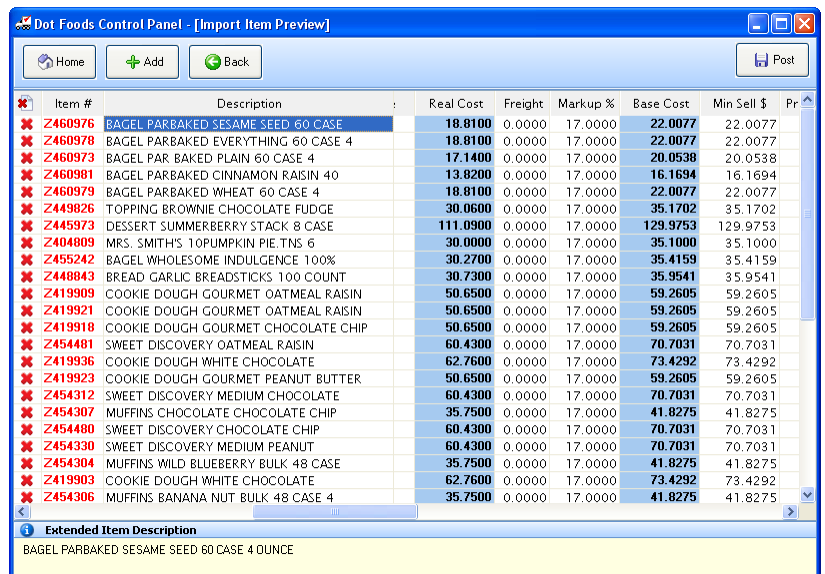
Import Items Preview

The Import Item Preview screen is your last chance to make changes to the items before you import them into your **entrée** inventory.

Most of the values displayed in this screen can be modified on a per item basis by highlighting the field to be changed and entering the new values. Columns that are highlighted in blue have values that may *not* be changed.

Once your item selection and edits have been completed click the **Post** button. The selected Dot Foods catalog items will be automatically added to your **entrée** inventory file.

After the Dot Foods catalog items are posted in **entrée** the special order (orange) and drop ship (brown) items will be easy to identify in your **entrée** Inventory Search screen because of their colors.



Price Updates

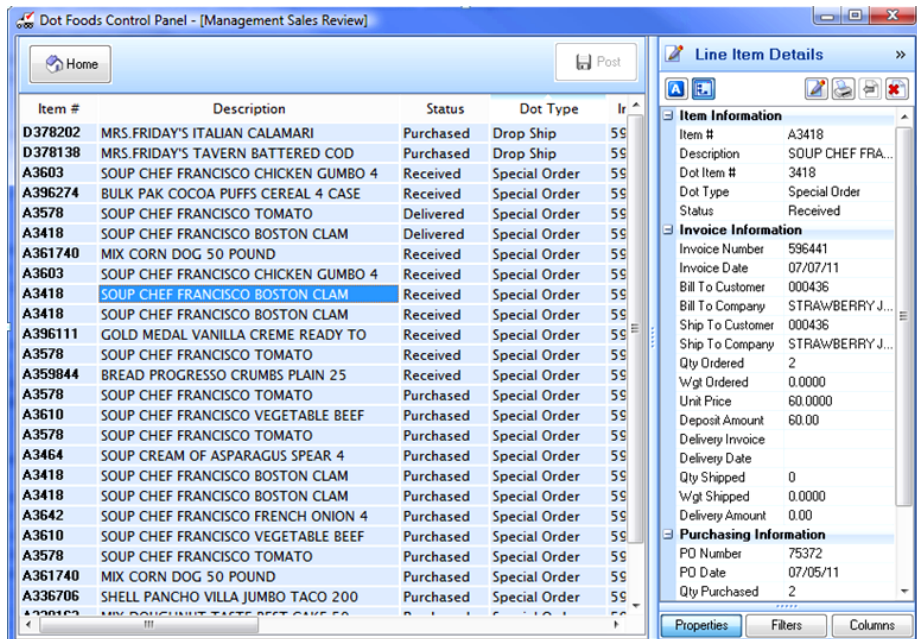
Once items from the Dot Foods catalog have been imported into **entrée** they must be kept up to date. This task is accomplished by running the Update items with new pricing from the Dot Foods Catalog on a daily basis.

If your files are current the message indicating that there are no new files to import will be displayed, other-wise an update to the dot foods database is performed.

Management Sales Review

The Management Sales Review screen is used to view pending sales and provide a historical view of the sales of your Dot Foods catalog items. The powerful Management Sales Review feature allows you to:

- Easily observe which products are selling well and use this information to adjust the items you import from the Dot Foods catalog.
- Make changes to 'special order items' on customer invoices.
- Edit invoices, sales orders, and/or purchase orders associated with the selected line item.
- Print invoices, loading sheets, sales order confirmations, sales order loading sheets, sales order releases, and/or purchase orders associated with the selected line item.
- Delete the selected item.
- Undo changes to the selected item.
- Properties, Filters and Columns similar to the Import Item Selection grid to help you easily find items or groups of items.



Create Purchase Orders

The Dot Foods interface works with **entrée** to make it fast and easy to create Purchase Orders for your Dot Foods items.

When manually creating a Purchase Order in **entrée** for a Dot Foods vendor, the 'Dot Pre-Orders' message box will display if there are open pre-order items that should be ordered. The 'Dot Special Order Item Selection' dialog will display so you can select the items you want to add to the Purchase Order.

You can click on the item to see the customer who ordered the item in the upper left.

Select all the desired Dot Foods items and they will be automatically added to the Purchase Order.

The Purchase Order can then be electronically sent to Dot Foods. You will get receive a status message confirming that the Purchase Order was successfully uploaded to Dot Foods.

Export Purchase Orders

Once Dot Foods items are added to an Invoice a Purchase Order for those items must be processed. There are three options available to facilitate the creation and export of Purchase Orders to Dot Foods electronically via FTP.

The first of these options is **Export Existing Purchase Orders**, which allows you to:

- Easily export existing Purchase Orders created in **entrée** by specifying date range, Vendor and Purchase Order Number.
- Export all qualifying Purchase Orders by leaving the Vendor filter empty.
- Click the Search tool to open the search dialog box for Vendor or PO Number.
- When you click OK the Purchase Orders are automatically built and sent to Dot Foods electronically via FTP in the background.
- A Status message box will display with the number of Purchase Orders uploaded to Dot Foods.

• Export Required Special Order Items

Special Order items are items which you make available to sell, however you do not stock these items in your warehouse. Whenever a customer orders one of these items, you must order it from the Dot Foods vendor to fulfill your customer's request.

This option allows you to easily create and export Purchase Orders for each qualifying Dot Foods vendor from pending customer Special Order items. You can specify Purchase Orders to be created and export by the Required Date or by Vendor.

• Export Required Drop Ship Items

Drop Ship items are items which you make available to sell, however you do not stock these items in your warehouse nor do they pass through your warehouse. Instead the item is shipped directly to your customer from Dot Foods.

This last export option allows you to generate Purchase Orders for Dot Foods items that will be drop shipped to your customer. When using this option, a single Purchase Order will be created for each customer that has drop ship items that have been pre-ordered.

The primary Dot Foods vendor, as defined in **entrée** System Preferences, will be used as the vendor for all the Drop Ship purchase orders.

Drop Ship Purchase Orders will be shipped to the 'Ship-To' customer address as defined on the invoice when the product was pre-ordered.

Chapter 2

Software Licensing Agreement

2 Software Licensing Agreement

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Updated September 2016

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

Chapter 3

Technical Requirements

3 Technical Requirements

NECS Software

entrée version 3.6.0 or later or the latest version of [entrée V4 SQL](#) is required.

entrée.NET

Our goal with **entrée.NET** is to offer you an online solution that fits closely with your needs. Distributors can choose from these options:

1. Website Only
2. **entrée.NET** Only
3. Website and ALL **entrée.NET** Features
4. Pop-Up Catalog for your existing website

Electronic Order Pad

The **Electronic Order Pad** application for the iPad and Android tablets was created to take the place of [entrée.DSR](#) for those food distributors looking to utilize the latest in technology and features for their sales force.

- Apple iPad & iPad Mini (Recommended)
- Android 4.1 or later, 7" or 10"
- Connection to the Internet, such as WIFI or cell data plan from Verizon, AT&T, etc.

Workstation Requirements

- Windows 7 / Windows 8
- Intel i5 or greater
- 4GB RAM
- 1360 x 768 minimum monitor resolution
- 60GB hard drive
- A connection to the Internet for import / export of data

Chapter 4

Getting Started

4 Getting Started

The purpose of this section is to provide you with a general overview of the installation and use of the **entrée.DOT** software.

entrée Versions

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

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

When you first install and run entrée.DOT you will need to perform these steps:

1. Setup Steps for entrée.DOT

- **entrée Updates**

A. Add or identify your Dot Vendors in [Vendor File Maintenance](#).

B. Update these 3 areas in [System Preferences](#):

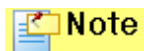
1. [entrée.DOT Tab](#): Enter all the required default settings for **entrée.DOT**.

2. [General Tab](#): Enter your company DUNS number, if not already there.

3. [System Options Tab](#): Add **entrée.DOT** related fields to the Invoice Information Panel configuration.

C. [Update individual Customer's](#) special order and drop ship deposit amounts in Customer File Maintenance as required. Only perform this update if the default deposit values entered in the **entrée.DOT tab** will not be used.

D. Enable the use of the **entrée.DOT [Management Sales Review](#)** utility for specific user accounts in the **entrée Security Management...** feature.



The [Management Sales Review](#) security authorization should **only** be given to users who **require** company-wide management level review and override powers for sales of Dot Foods items. By default this utility is disabled for all user accounts in the **entrée Security Management...** feature.

- **entrée.NET Updates**

If you have the **entrée.NET**, the internet order entry & website add-on module, your System Administrator will need to perform updates to the **Settings Options** in the **Order Entry** section to enable the use of **entrée.DOT**.

- See the [Setup in entrée.NET](#) chapter for details.



2. How to install & run entrée.DOT for the first time

- A. Open the **entrée.DOT Control Panel**.
- B. In the Dot Foods Control Panel click the [Update items with new pricing from the Dot Foods Catalog](#) utility to query the Dot Foods FTP site for the new catalog and pricing files. The files will be imported automatically.
- C. In the Dot Foods Control Panel click the [Import items to entrée from the Dot Foods Catalog](#) button to load the current Dot Foods catalog from the database.
- D. Click the **Auto Link** button to link your current **entrée** inventory items to items in the Dot Foods Catalog.
- E. Use the filtering tools to select the Dot Foods items you would like to import into **entrée**.
- F. Edit Item Import Configuration settings if the default values entered in the **entrée.DOT tab** will not be used.
- G. Preview the selected items list and edit item information before importing. Edit / add / remove items to fine tune your item list.
- H. Once your item list is ready click **Post** to import the selected items into **entrée**. The items from Dot Foods will now appear in your catalog.

3. Daily Processing in entrée and entrée.DOT

- A. In the Dot Foods Control Panel the [Update items with new pricing from the Dot Foods Catalog](#) utility must be run daily to keep item prices and information up to date.
- B. If any new items need to be added from the Dot Foods catalog follow the procedure to select, filter and import those items into **entrée**.
- C. Orders will be entered creating invoices in **entrée** with special order and drop ship items available from the item catalog.
- D. Purchase Orders are manually created in **entrée** using Create/Change Purchase Order for invoices that combine normal and pre-ordered items.
- E. Purchase Orders for only pre-ordered special order and drop ship items will be automatically generated using the **entrée.DOT [Build / Export Purchase Orders to Dot Foods Utility](#)**.
- F. Authorized personnel will review and adjust the quantity of special order items on invoices and purchase orders using the **entrée.DOT [Management Sales Review](#)** utility as required.
- G. Receiving will be processed using **entrée**.
- H. Delivery:
 - a. Drop ship items will be delivered directly to the "Ship To" address of the customer.
 - b. Special order items will be received at your warehouse and delivered to the customer by your trucks.

Chapter 5

entrée Setup for entrée.DOT

5 entrée Setup for entrée.DOT

Before formal communications between **entrée.DOT** and the **entrée** system can be completed some setup work needs to be done in the main **entrée** system. This section will guide you through the setup process and must be completed before attempting to use the **entrée.DOT** features.

- **There are 3 areas in entrée that *require* setup work for entrée.DOT:**

- [Vendor File Maintenance](#)

- [System Preferences](#) - Has 3 areas to update the **entrée.DOT** tab, **General** tab and **System Options** tab.

- [Customer File Maintenance](#)

entrée.DOT allows for a deposit amount to be charged on the initial invoice when a special order or drop ship item is purchase by the customer.

This deposit amount is then credited back to the customer's account on the final invoice when the product actually ships to the customer. This setting can be overridden on a per customer basis in Customer File Maintenance.

- Once the **entrée** setup work is completed, go to the [Dot Foods Control Panel](#) in and begin the process to import Dot Foods items into **entrée**.

- **entrée V3** use menu path: **Inventory** > **entrée.DOT Control Panel**.

- **entrée V4 SQL** Go to the **Add-Ons** ribbon menu and click the **entrée.DOT** drop down menu.

Supporting Features in entrée

In addition to the areas that need to be setup for **entrée.DOT** there are areas in the main **entrée** system that have been enhanced to support features related to the use of Dot Foods catalog items. For example, you can now add a manufacturer to an item and run reports by manufacturer. Click the links below to view these **entrée** topics:

- [Manufacturer File Maintenance](#)

With the goal of tracking sales information properly, when purchasing from a master distributor such as Dot Foods, sorting by 'Brand Name' does not work because many manufacturers produce products under a variety of Brand Names.

The **entrée** Manufacturer File Maintenance subsystem allows you to define Item Manufacturers which can then be assigned to individual inventory items.

The addition of this feature recognizes the fact that the vendor from whom you purchase a particular product may only be a reseller (such as Dot Foods) and not the original manufacturer of the product.

The reporting system in **entrée** has been updated to support the Manufacturer feature.

- [Invoicing](#)

- **Inventory File Maintenance**

When using **entrée.DOT**, a .DOT tab has been added to Inventory File Maintenance for Dot Foods catalog items. This tab will display key information from the Dot Foods item catalog.

entrée will determine if an item in the inventory file is a 'Dot Foods' catalog item by first determining if one or more of the vendors for the item (vendor tab) are flagged as a 'Dot Vendor'.

The system will then cross compare the assigned vendor item number to the item numbers in the Dot Food catalog file. If a match is found, the item is deemed to be a Dot Foods item.

This methodology allows for all the existing items that are purchased from Dot Foods to be automatically linked with the operator having to perform any additional tasks.

Key values, such as UPC Code, Cubes, Pallet Information, Gross Weight and Manufacturer Item # will automatically be updated from the Dot Foods catalog when viewing Dot Foods items in Inventory File Maintenance.

- **Dot Item Type:** This field allows you to change how the item is sold in **entrée**. Available choices are Special Order, Drop Ship and Normal. This value can only be changed if there are no sales of the item in the current period.
- **Lead Time:** This field allows the default lead time for the Dot Foods special order or drop ship item to be overridden on a per item basis. This field is not enabled for 'Normal' Dot Foods catalog items.
- **Selling UOM:** This field is used to assist in the purchasing process for 'normal' Dot Foods catalog items. For most items it is fine to leave this field set to the default value 'CASE'. However if you do not sell the item in the same manner that it is purchased from Dot Foods you will want to adjust this field to how you sell the item. This feature helps prevent incorrect quantities from being ordered from Dot Foods. Available choices are as follows:
 - **CASE:** The item is sold the same way that it is purchased.
 - **PC:** The item is purchased by the case, but only sold as individual pieces.
 - **LB:** The item is purchased by the case, but sold by the pound.

Include in export to entrée.DSR: Checking/un-checking this box will enable/disable export of the specific the Special Order or Drop Ship item into **entrée.DSR** (laptop software for your distributor sales reps) software.

- **Purchase Orders**
- **Receiving**

5.1 Vendor File Maintenance

First Step in the entrée.DOT Setup Process - Identify Your Dot Vendors

As a part of the setup process you will need to identify and flag your Dot Vendors in **entrée**. This is done in Vendor File Maintenance on the **Broker/Notes** tab in version 3 and in the **Vendor** tab in V4 SQL.



Note

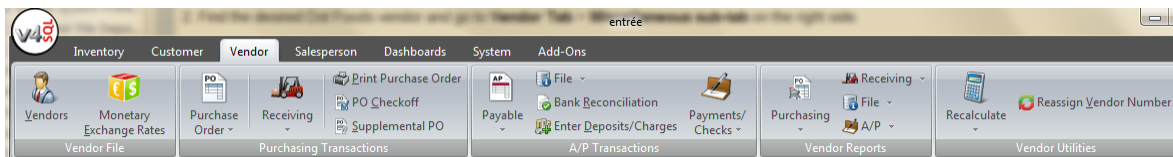
entrée.DOT does support multiple or departmentally organized vendors for Dot Foods purchases.

entrée V4 SQL Security Manager

In the **entrée V4 SQL Security Manager** under the User Account Settings Miscellaneous options is **#111 "Allow editing in Vendor File Maintenance"** it must be checked to allow users update access to the vendor file. By default all user accounts will have this option checked and have the ability to update the vendor file.

entrée V4 SQL

1. Go to the **Vendor** ribbon menu and click the **Vendors** option.



2. Find the desired Dot Foods vendor and go to **Vendor Tab > Miscellaneous sub-tab** on the right side.

Vendor File Maintenance

Vendor Number: 301 | Buyer: RS | Type: INV | Contact: Brand Lamb | Title: INSIDE SALES

Company: DOT FOODS | Phone: 765/312-0100 | Toll Free: 877/701-2451

Address: 4529 SOLUTIONS CENTER | Fax: 217/773-2595

#774529 | Email: brand.lamb@dotfoods.com

CHICAGO | IL | 60677 | Website: | Ship Via: Warehouse | FOB: TRUCKING Co

Account #: | Country: | Misc Code: XX | Inactive: | Comment: Tim Lloyd, GM, Cambridge City 765-312-0100

Customer #: |

Vendor | Purchasing | Items | Maps

Remittance | Broker Address | Accounting | Payments | GL/Account | Monetary Exchange | Miscellaneous

Address: 14600 GATEWAY RD | CAMBRIDGE CITY | IN | 47327 | Copy Vendor Address

Hot Message | Notes | Special Instructions | AP Notes

Payment Terms: NET 30 | Priority: 2 | Net Due Days: 28 | Disc. Days: 0 | Credit Limit: 30,000 | Payment Disc. %: 0.000 | Sales Tax %: 0.0000

Invoice	Inv Date	Due Date	PO Number	Current	Over 28
9520668	11/19/12	12/17/12	37764	\$ 0.00	\$ 42,591.97
9541826	11/29/12	12/27/12	37812	\$ 0.00	\$ 1,192.50
9541823	11/29/12	12/27/12	37674	\$ 0.00	\$ 57.54
9541825	11/29/12	12/27/12	37804	\$ 0.00	\$ 30,112.08
9564702	12/06/12	01/03/13	37843	\$ 0.00	\$ 3,067.95
9564703	12/06/12	01/03/13	37847	\$ 0.00	\$ 18,650.49
9564704	12/06/12	01/03/13	37850	\$ 0.00	\$ 54.60
Totals				0.00	95,727.13

Dot Vendor | Production Vendor | Default Warehouse: MAIN

Last Invoice: 9564702 on 12/06/12 for \$ 3,067.95
 Last Payment: 24608 on 12/06/12 for \$ 23,745.98
 Open POs: \$ 0.00 | MTD Purchases: \$ 786.78
 Open Debits: \$ 0.00 | Balance: \$ 95,727.13

243 of 864 | Add | Copy | Delete | Contacts | Dashboards | Apply | OK | Close

3. Check the **Dot Vendor** box to flag your Dot vendors.
4. Click **Apply** then click **OK**.
5. Repeat steps 2 - 4 to identify all your Dot vendors.

The screenshot shows a software window with several tabs: 'GL/Account', 'Monetary Exchange', and 'Miscellaneous'. The 'Dot Vendor' checkbox is checked and highlighted with a red box. Other options include 'Production Vendor' (unchecked) and 'Default Warehouse' set to 'MAIN'.

entrée V3

1. Use menu path: **File > Vendor Maintenance**
2. Find the desired Dot Foods vendor go to > **Broker / Notes** tab.
3. Check the **Dot Vendor** box to flag your Dot vendors.
4. Click **Apply** then click **OK**.
5. Repeat steps 2 - 4 to identify all your Dot vendors.

The screenshot shows the 'Vendor File Maintenance' window. At the top, 'Vendor Number' is 'DOT' and 'Company' is 'DOT FOODS,INC DRY'. The 'Broker/Notes' tab is selected. The 'Broker' section contains fields for Name, Address 1, Address 2, City, State, Contact, Phone, FAX, and ZIP. The 'Notes' section has a text area and 'Add Note'/'Delete Note' buttons. At the bottom right, the 'Dot Vendor' checkbox is checked and highlighted with a red box. The bottom of the window shows navigation buttons and a '364 records' indicator.

- For more detailed information about Vendor File Maintenance and assigning vendor numbers please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

5.2 entrée System Preferences

The Second Step in the Setup Process - Update 4 Areas in System Preferences

1. [entrée.DOT Tab](#)

System Preferences in **entrée** has been updated with a new **entrée.DOT** tab. Use the features in this tab to set up the interface between **entrée**, **entrée.NET**, **entrée.DSR** and the **entrée.DOT** software.

- You need to provide information for 5 areas of the **entrée.DOT** tab:

- [Primary Dot Vendor](#)
- [Special Order Items](#)
- [Drop Ship Items](#)
- [FTP Settings](#)
- [Default Import Settings](#)

2. [General Tab Add Company D-U-N-S Number](#)

In the General tab Miscellaneous section it is required that you enter the D-U-N-S number assigned to your business entity.

3. System Option #174 - "Use pricing from Dot Foods catalog when creating Purchase Orders"

- Used in systems that have the **entrée.DOT** add-on module. This system option changes the way default cost values are established for Purchase Order line items. When this option is enabled items which are purchased from Dot Foods will have the cost of the items retrieved from the Dot Foods Catalog Pricing File.
- When this option is disabled and for items which are **not** purchased from Dot Foods, the standard method of using the price derived in the Purchasing system will be used for the default cost.
- On systems which do not have the **entrée.DOT** add-on module this option will be shown as "reserved" and will be disabled.

4. [Invoice Information Panel Configure](#)

The **System Options** tab Additional Features section in **entrée** has added two new fields related to Dot Foods items, **Dot Lead Time** and **Dot Item Type**. To have this information available in the Invoice Information Panel for your company perform this update.



Note

This update is not required for installation of **entrée.DOT**, but will provide useful information about lead time days and dot item type during invoicing.

5.2.1 entrée.DOT Tab

entrée.DOT Tab Features

- **Automatically update costs/prices when importing DOT price files**

Check the items you would like automatically updated upon import: Normal, Drop Ship and Special Order.

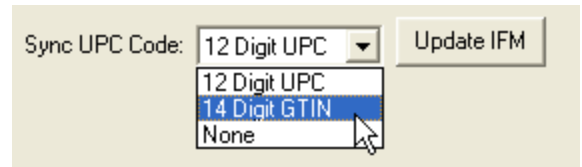
- **Sync UPC Code**

A new feature has been added to the System Preferences utility to the "**entrée.DOT**" tab in **entrée** that allows you to control how the "UPC Code" value is updated on inventory items that have been linked to items in the Dot Foods catalog.

By default the **entrée.DOT** add-on module will automatically synchronize each linked item with the 12-digit **UPC Code** from the Dot Foods catalog. You can alternately choose to synchronize to the 14-digit **GTIN** number or to have no synchronization performed at all.

Update IFM - Click the button which will assist with updating all your inventory items with the new UPC Code setting change.

Update IFM will immediately synchronize ***ALL*** linked items based on the current UPC Code selection.



- **Purchasing Manager Email Address** - Enter the email address for the employee responsible for purchasing.

- **Warnings Button**

A **Warnings** button has been added to the System Preferences **entrée.DOT** tab. This is the **Scan for Invalid Inventory Items Utility**. It will scan your list of Dot Foods items looking for Dot items which are linked to "*invalid*" inventory items. The utility will also look for cross-linked items (the same **entrée** Item Number being assigned to multiple Dot Foods items).

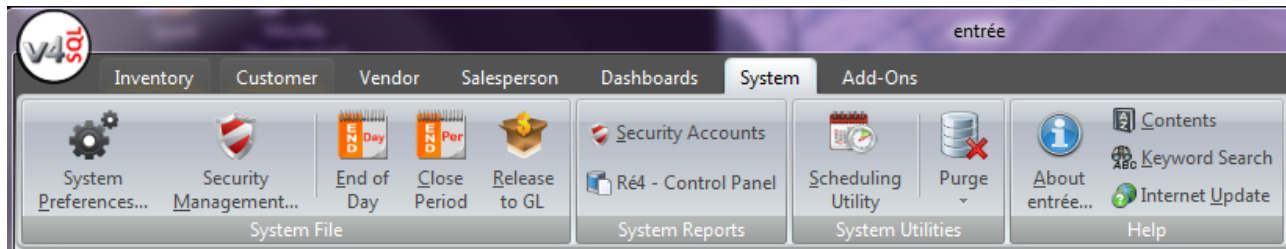
Click the **Warnings** button and the Please Wait... processing message will display on the screen indicating that the scan is running. If no problems are found the Information message box will be displayed indicating that there are no warnings.

If linking problems are found in the file they are displayed in a pop-up dialog which gives you the ability to print or save the warnings list so you can make corrections to the items.

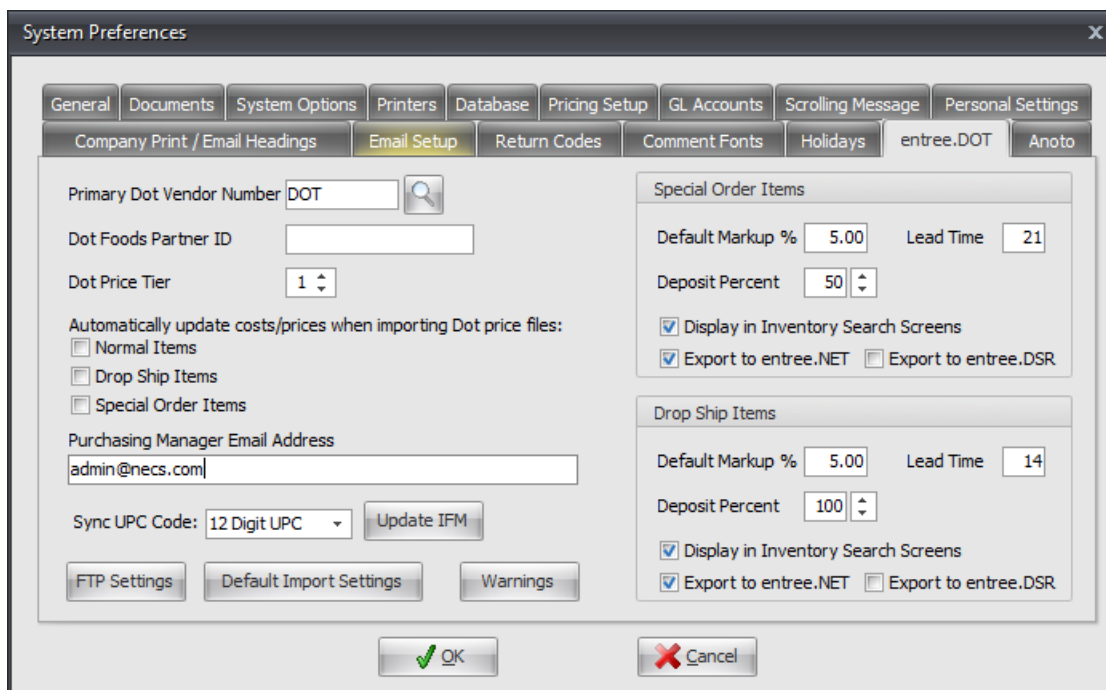
Setup for Dot Foods Connection

entrée V4 SQL

1. Go to the **System** ribbon menu and select **System Preferences**.



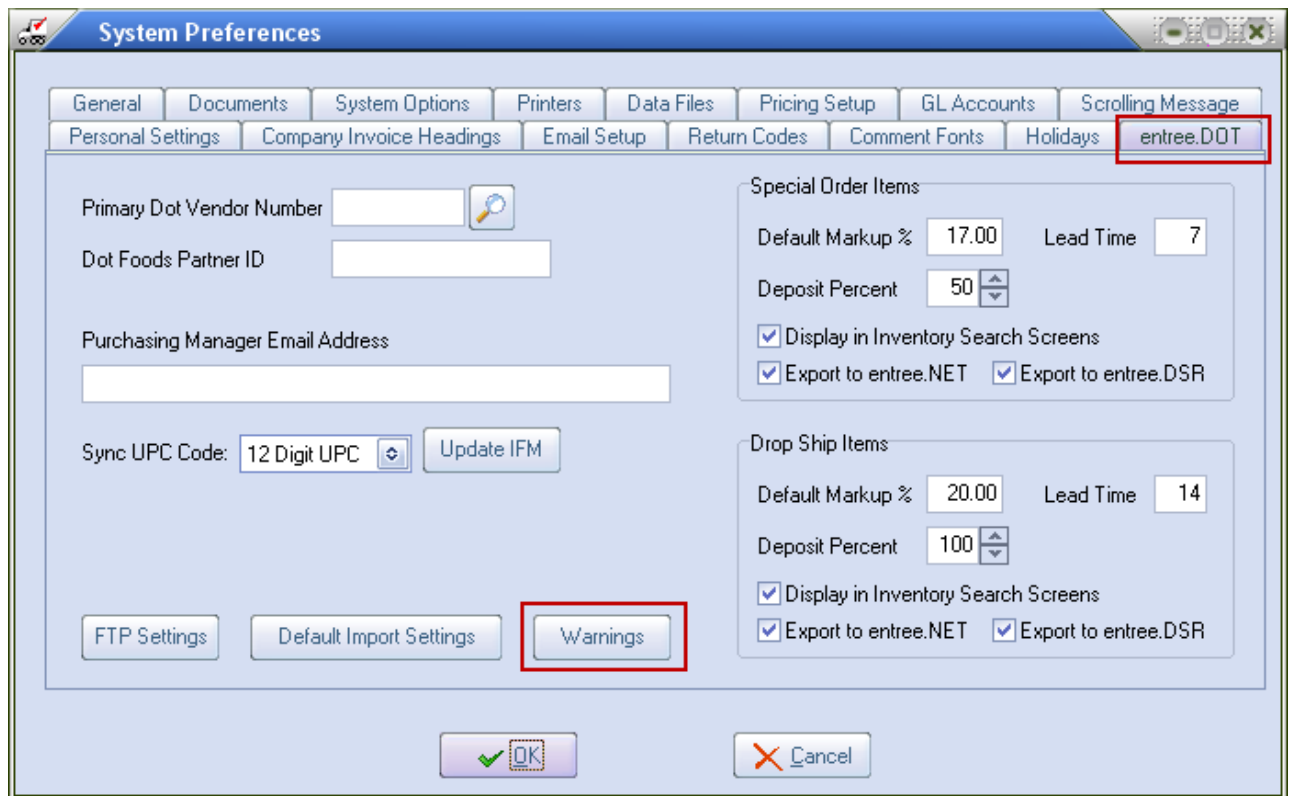
2. Click the **entrée.DOT** tab.



3. Follow the instructions to update the **entrée.DOT** tab fields beginning with step 2 as documented in the **entrée V3** section that follows.

entrée V3

1. From the main menu of the **entrée V3** use menu path: **System > Preferences >** click the **entrée.DOT** tab.




2. There are six areas that you need to setup on the **entrée.DOT** tab.

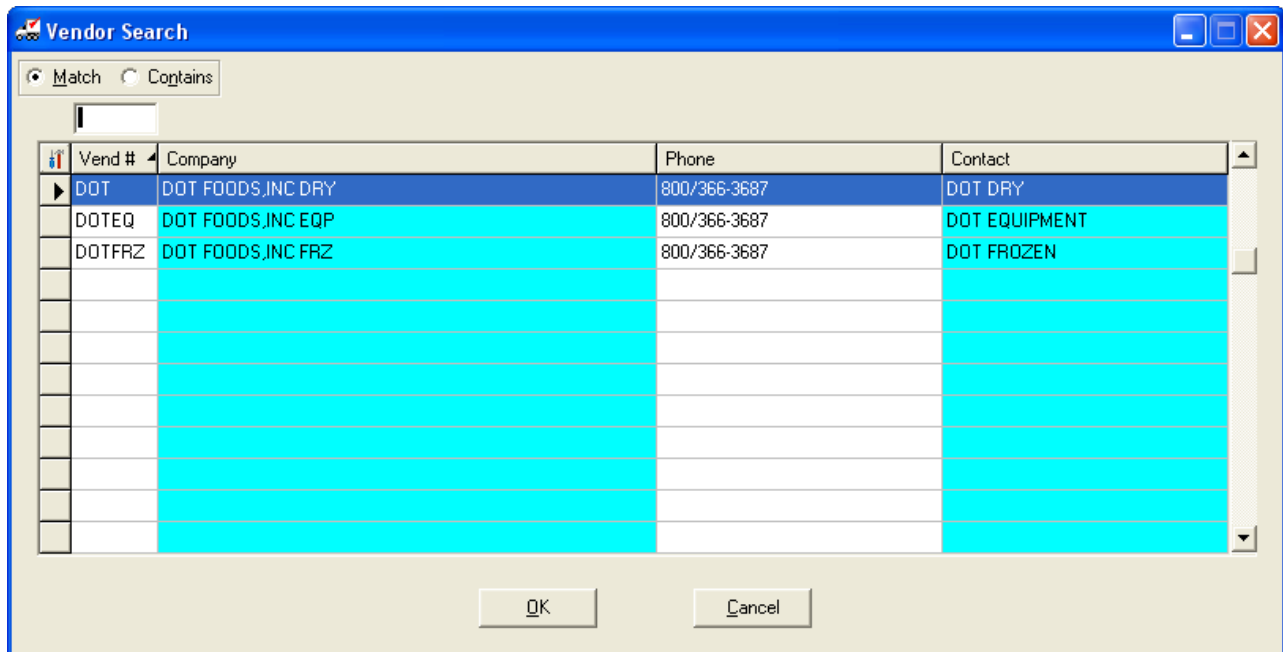
- a. Primary Dot Vendor Number
- b. Dot Foods Partner ID (Is not used at this time).
- c. Purchasing Manager Email Address
- d. Special Order Items / Drop Ship Items section
- e. FTP Settings
- f. Default Import Settings

a. Primary Dot Vendor Number

This should be set to the **entrée** vendor number that is assigned to Dot Foods. If multiple vendors exist for Dot Foods, this should be the main account that should be used when automatically generating purchase orders for special order or drop ship items.



Use the search tool  to select the vendor information from the vendor file as shown in the image below.



Note The search on the Primary Dot Vendor Number field will only display vendors that have already been flagged as a “dot vendor” in vendor file maintenance (the first step in the **entrée** setup for **entrée.DOT** process).

- **If you have not flagged any “Dot vendors” before going to System Preferences you have 2 options:**
 1. You can manually enter the vendors number in the Primary Dot Vendor Number field and you will be prompted to change the vendor to a “dot vendor”.
 2. Go back to vendor file maintenance and mark all the vendors that are "dot vendor" then come back to the System Preferences **entrée.DOT** tab and set the primary dot vendor.

b. Dot Foods Partner ID - This information is not required at this time.

c. Purchasing Manager Email Address

Enter the email address of the person that should receive notifications from Dot Foods regarding electronically submitted purchase orders. These notifications could be confirmation of receipt or notification of problem filling a purchase order.

d. Special Order Items / Drop Ship Items sections

Special Order Items:

- Default Markup %
- Lead Time
- Display in Inventory Search Screens
- Export to **entrée.NET**
- Export to **entrée.DSR**

Drop Ship Items:

- Default Markup %
- Lead Time
- Display in Inventory Search Screens
- Export to **entrée.NET**
- Export to **entrée.DSR**

- **Default Markup %**

This the markup percentage that should be used to derive pricing when importing a new special order or drop ship item from the Dot Foods catalog. This setting can be overridden on a per item basis when Dot Foods catalog items are imported into the **entrée** item file or in Inventory Maintenance after the items have been imported.

- **Lead Time**

Enter the default number of days that it will take from time of invoicing for the customer to receive a special order or drop ship item from Dot Foods. Lead time is used during the invoicing process to convey to the DSR an approximate date when the customer should be receiving the product. This setting can be overridden on a per item basis when Dot Foods catalog items are imported into the **entrée** item file or in Inventory Maintenance after the items have been imported.

- **Deposit Percent**

entrée.DOT allows for a deposit amount to be charged on the initial invoice when a special order or drop ship item is purchase by the customer. This deposit amount is then credited back to the customer's account on the final invoice when the product actually ships to the customer. This setting can be overridden on a per customer basis in Customer File Maintenance.

- **Display in Inventory Search Screens**

Check to enable this option so Special Order and Drop Ship items will be displayed in Inventory Search Screens.

- **Export to entrée.NET**

Enable this option if special order or drop ship items should be exported to **entrée.NET** by default. This setting can be overridden on a per item basis when Dot Foods catalog items are imported into the **entrée** item file or in Inventory Maintenance after the items have been imported. Items exported to **entrée.NET** will also be seen in the [Electronic Order Pad](#).

- **Export to entrée.DSR**

Enable this option if special order or drop ship items should be exported to **entrée.DSR** by default. This setting can be overridden on a per item basis when Dot Foods catalog items are imported into the **entrée** item file or in Inventory Maintenance after the items have been imported.

Inventory Search Screen Colors & Dot Items


entrée V4 SQL

By default, Special Order Items are displayed in orange text on white background and Drop Ship items are displayed in brown text on white background. The Inventory Search Configuration Highlight Colors tab image below shows the Special Order Items example. Use the **Highlight Colors** tab to customize your colors for inventory searches.

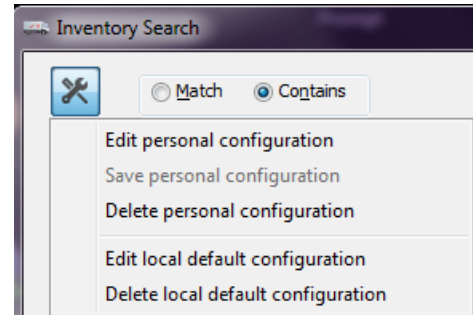
Changing the Colors in V4 SQL Inventory Search

1. Go to the **Inventory** ribbon menu and click the **Inventory** option.

2. Click the **Inventory Search**  button.

3. Click the **Tools**  button in the Inventory Search screen.

4. Make a selection from the drop down menu displayed from either Personal or Local Configurations.



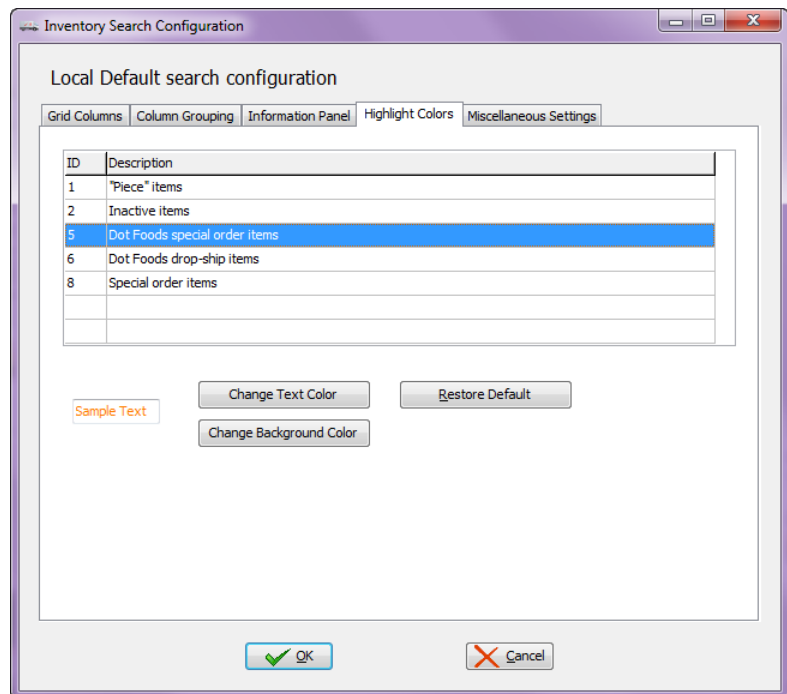
5. Here the Local Default search configuration was selected. Click the **Highlight Colors** tab.

6. Select the **ID / Description** that you would like to change the a color. The current color will be displayed in the Sample Text box when you make the change.

7. Use the **Change Background Color** and/or **Change Text Color** buttons to modify the colors.

8. Once you are satisfied with the new colors click **OK**.

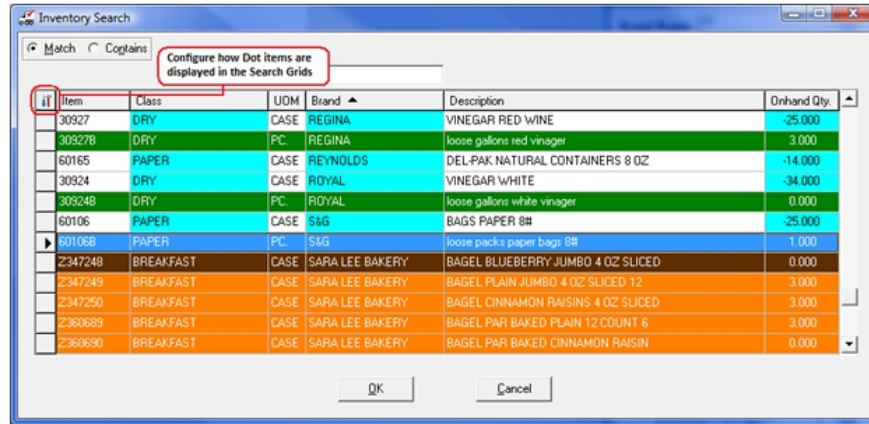
9. To restore the **entrée.DOT** default colors click the **Restore Default** button.



- Go to the [entrée V4 SQL KnowledgeBase](#) **Using the V4 Search Screens** chapter for more information about the great new features for searching in the V4 SQL system and the local and personal configuration options.

entrée V3

By default, Special Order Items are highlighted in orange with white text and Drop Ship items are highlighted in brown with white text.



Changing the Colors in V3 Inventory Search

1. Use menu path: **File > Inventory Maintenance** and click the **Inventory Search** button.
2. Click the **Tools** icon (in the upper left corner of the Inventory Search grid outlined in red).
3. The **Grid Properties** dialog will open.
4. Click on the **Color Configuration 2** tab.

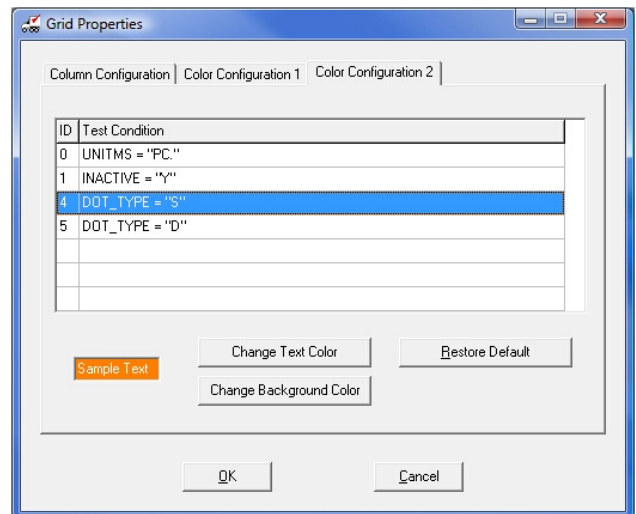


5. Select the **ID / Test Condition** that you would like to change the a color.

DOT_TYPE = "S" is for special order items.

DOT_TYPE = "D" is for drop ship items.

The current color will be displayed in the **Sample Text** box when you click the ID.

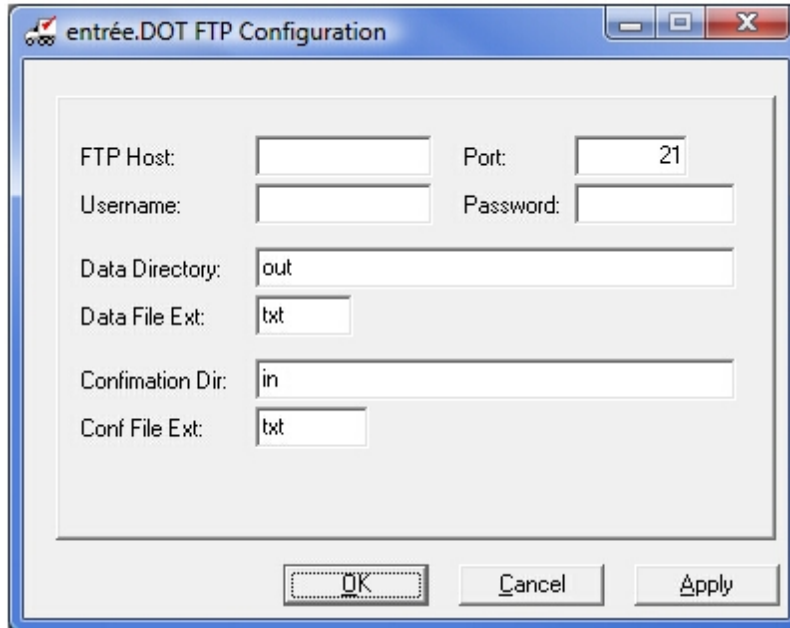


6. Use the **Change Background Color** and **Change Text Color** buttons to modify the colors.
7. Once you are satisfied with the new colors click **OK**.
8. To restore the **entrée.DOT** default colors click the **Restore Default** button.

Next FTP Settings for entrée.DOT
[e. FTP Settings for entrée.DOT](#)

5.2.1.1 - FTP Settings for entrée.DOT

Click the **FTP Settings** button to open the **entrée.DOT** FTP Configuration dialog. This is where the settings required to transmit purchase orders electronically and receive electronic Dot Catalog information are configured. The settings are the same in **entrée V4 SQL** and **entrée V3**.



- **FTP Host** - Enter the name of the ftp server provided by Dot Foods in this field.
- **Port** - Leave this field set to the default, **21**.
- **Username** - Enter your distributor username, provided by Dot Foods in this field.
- **Password** - Enter your distributor password, provided by Dot Foods in this field.
- **Data Directory** - This is the directory where you will pick up files that have been sent to you by Dot Foods and should be set to “out” (all lowercase).
- **Data File Ext** - This field represents the file extension of the files that Dot Foods will send to you and should be set to “txt” (all lowercase).
- **Confirmation Dir** - This is the directory where you will post purchase order files that will be submitted to Dot Foods and should be set to “in” (all lowercase).
- **Conf File Ext** - This field represents the file extension of the files that you will send to Dot Foods and should be set to “txt” (all lowercase).



Note This screen is case sensitive. Information must be typed exactly the way it appears in your directories.

Next Configure entrée.DOT tab Default Import Settings

- [Default Import Settings for entrée.DOT](#)

5.2.1.2 - Default Import Settings for entrée.DOT

When items are imported from the Dot Foods catalog into the **entrée** inventory file, key pieces of data need to be mapped to an appropriate field in the **entrée** database. The **Dot Item Import Configuration** tool allows you to specify how those pieces of data are mapped. The settings are the same in V4 SQL and V3.

Customize your import default settings by making selections from the drop down lists provided. This includes fields like: item number, item description, brand, category and class names.

The data fields are broken into three sub categories and are located down the left side of the dialog.

Along the right edge of the dialog is an instruction/informational panel, that details how the currently selected field relates to **entrée** and the options available for the import operation.

- **Basic Item Information** - Use the drop down lists to choose options for imported items.
 - Import item numbers
 - Import number prefix - Enter an Item number prefix to identify the Dot Foods items in your catalog.
 - Import item description
- **Item Grouping** - Use the drop down lists to choose your import grouping options.
 - Brand Import Field
 - Class Import Field
 - Category Import Field
 - Group Import Field
 - Group Import Field Default

- **Special Codes** - Fill in new values or use the defaults.
 - Item Misc. Code / Position
 - Kosher Misc. Code / Position
 - Hazmat Misc. Code / Position
 - Hazmat Comment
 - Matrix Misc. Code / Position
- **Defaults** - This button restores the system defaults.

Next Perform the Second System Preferences Update in the General Tab

- [General Tab Add D-U-N-S Number](#)

5.2.2 General Tab Add DUNS Number

In the **General** tab **Miscellaneous** sub-tab it is *required* that you enter the D-U-N-S or DUNS (Data Universal Numbering System) number assigned to your business.

The D-U-N-S number is a unique nine-digit number assigned to each business for the purposes of identification. The screens are different but the D-U-N-S number is the same in **entrée V4 SQL** and **entrée V3**.

entrée V4 SQL

1. Enter the D-U-N-S number assigned to your business.
2. Click **OK**.

The screenshot shows the 'System Preferences' dialog box with the 'General' tab selected. Within the 'General' tab, the 'Miscellaneous' sub-tab is active. The 'Company Information' section contains the following fields:

- Company Website:
- Company Email:
- D-U-N-S+4:

Below these fields is a checkbox labeled 'Enable faxing' which is currently unchecked. To the right, the 'Accounting System' section includes:

- System Version:
- AP Release #:
- Year End:

At the bottom right, there are four numeric input fields:

- Bounced Check Fee:
- Fuel Surcharge:
- Auto Logoff Delay (minutes):
- Catchweight +/- percent:

At the bottom of the dialog, there are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon).

entrée V3

1. Enter the D-U-N-S number assigned to your business.
2. Click **OK**.

System Preferences

Personal Settings | Company Invoice Headings | Email Setup | Return Codes | Comment Fonts | Holidays | entrée.DOT

General | Documents | System Options | Printers | Data Files | Pricing Setup | GL Accounts | Scrolling Message

Company Information | Delivery Address | Miscellaneous

Company Website

D-U-N-S+4:

Enable faxing

Accounting System

System Version:

AP Release #:

AP Link Company:

GL Link Company:

Year End:

Bounced Check Fee:

Fuel Surcharge:

Auto Logoff Delay (minutes):

Catchweight +/- percent:

Next Perform the Third System Preferences Update

- Add Dot fields to the [Invoice Information Panel Configuration](#)

5.2.3 Invoice Information Panel Configuration

Reconfigure the Invoice Information Panel for Dot Items

entrée V4 SQL

1. Go to the **System** ribbon menu and select **System Preferences**.
2. Click the **System Options** tab and click on the **Additional Features** drop down menu.
3. Select **Invoice Information Panel Configuration** in the menu and click the **Configure** button.
4. Look for the Dot fields listed below in the Available values column:

- The **Dot Lead Time** option will display the number of days that it typically takes to get the special order or drop ship item from Dot Foods.
- The **Dot Item Type** option will display if the currently selected item is a Dot Special Order or Drop Ship item.

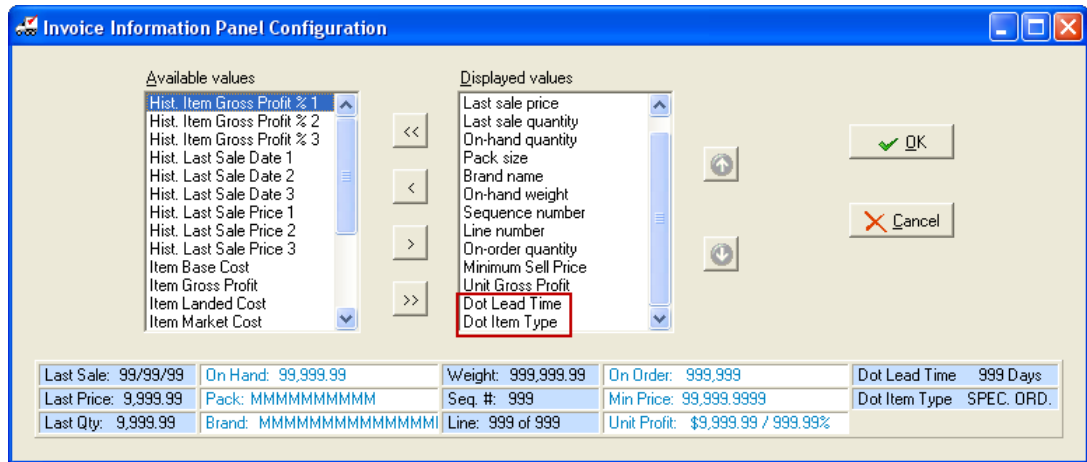
5. Click the Dot field in Available values then click the right arrow button.
6. The Dot field will now be added to the Displayed values column as see in the image below.
7. Once you have added the Dot fields you require click **OK**.
8. Click **OK** on the System Preferences screen.
9. Your System Preferences updates for **entrée.DOT** are done.

Available values		Displayed values	
Hist. Item Gross Profit % 2		Last sale price	
Hist. Item Gross Profit % 3		Item Base Cost	
Hist. Last Sale Date 2		Item Gross Profit	
Hist. Last Sale Date 3		Price Level 1	
Hist. Last Sale Price 2		Price Level 2	
Hist. Last Sale Price 3		Price Level 3	
Invoice Warehouse		Dot Item Type	
Item Billback Amount		Dot Lead Time	
Item Landed Cost		Warehouse Location	
Item Market Cost		Unit Gross Profit	
Item Real Cost		Hist. Last Sale Date 1	
Item Warehouse		Hist. Last Sale Price 1	
Last Received		Hist. Item Gross Profit % 1	

Line: 999 of 999	OH Weight: 999,999.99/Cs: 999,999.99	Level 3: 9,999.99
Seq. #: 999	Last Sale: 99/99/99	Dot Item Type: SPEC. ORD.
Brand: MMMMMMMMMMMMMMMM	Last Qty: 9,999.99	Dot Lead Time: 999 Days
Pack: MMMMMMMMMMMM	Last Price: 9,999.99	Item Whse Loc: W105-96
Pieces per Case: 999	Base: 9,999,999.99	Unit Profit: \$9,999.99 / 999.99%
NON-STOCK	Item Profit: \$9,999.99 / 999.99%	Last Sale 1: 99/99/99
On Order: 999,999	Level 1: 9,999.99	Last Price 1: 9,999.99
OH Quantity: 99,999.99/Cs: 99,999.99	Level 2: 9,999.99	Item Profit % 1: 999.99%

entrée V3

1. Use menu path: **System > Preferences > System Options** tab.
2. In the **Additional Features** section click the drop down menu and select the **Invoice Information Panel Config** option.
3. Click the **Configure** button
4. The Invoice Information Panel Configuration dialog box will be displayed.
5. Look for the Dot fields listed below in the Available values column:
 - The **Dot Lead Time** option will display the number of days that it typically takes to get the special order or drop ship item from Dot Foods.
 - The **Dot Item Type** option will display if the currently selected item is a Dot Special Order or Drop Ship item.
6. Click the Dot field in Available values then click the right arrow button.
7. The Dot field will now be added to the Displayed values column as see in the image below.
8. Once you have added the Dot fields you require click **OK**.
9. Click **OK** on the main System Preferences screen.
10. Your System Preferences updates for **entrée.DOT** are done.



Go to the Last Step in the entrée.DOT Setup Process

- [**Customer File Deposit Updates**](#)

5.3 Customer File Deposit Updates

The Third and Final Step of the entrée.DOT Setup Process

Update Customer File Dot Foods Options

For some customers you may not want to use the default values set up in the **System Preferences entrée.DOT** tab. When a customer needs a different deposit rate when ordering Special Order or Drop Ship items from Dot Foods, it can be specified in the Customer File Maintenance Dot Foods Deposit Overrides section.

entrée V4 SQL

1. Go to the **Customer** ribbon menu and click the **Customer** option.
2. Find the desired customer and click the **Miscellaneous** tab.

The screenshot shows the 'Customer' ribbon menu with the 'Miscellaneous' tab selected. The 'Dot Foods Overrides' section is highlighted with a red box. It contains two checked options: 'Override Special Order Deposit' and 'Override Drop Ship Deposit', both with a value of 2%.

3. Go to the **Dot Foods Deposit Overrides** section.
4. Use the arrows to set the values for **Special Order Deposit Percent** and/or **Drop Ship Deposit Percent** as required for that specific customer.
5. Repeat steps 2 - 4 for any other customers requiring updates.

entrée V3

1. Use menu path: **File > Customer Maintenance**.
2. Find the desired customer then click the **Miscellaneous 2** tab.

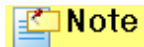
The screenshot shows the 'Customer File Maintenance' window for customer '000105' (REDWOOD CAMP). The 'Miscellaneous 2' tab is selected. The 'Dot Foods Deposit Overrides' section is highlighted with a red box. It contains two checked options: 'Special Order Percent' set to 50 and 'Drop Ship Percent' set to 100.

3. Go to the **Dot Foods Deposit Overrides** section.
4. Use the arrows to set the values for **Special Order Deposit Percent** and/or **Drop Ship Deposit Percent** as required for that specific customer.
5. Repeat steps 2 - 4 for any other customers requiring updates.

When the initial invoice is printed (see example image below), the original deposit amount that was charged (notice the capitol letter 'D' for Deposit in the Extended Amount column) will be deducted from the extended amount.

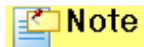
Customer No.	Salesperson	Route/Stop	Order Date	Delivery Date	Terms	Invoice No.			
000478	25		07/01/11	07/01/11	CC/CASH/CHECK	596439			
LINE	ITEM NUMBER	QTY. ORDER	QTY. SHIP	UOM	DESCRIPTION	BILLIN UNITS	UNIT PRICE	EXTEND AMOUNT	
** REFRIGERATED ITEMS **									
1	00386	1	1	CASE	___BUTTER WHIPPED 2/5#	10.00	4.0000	40.00	
2	60045	1	1	CASE	___CREAMER NON-DAIRY COFFEE 1QT	12.00	18.0000	216.00	
*** Payment Due by 07/02/11 ***									
==> The following SPECIAL ORDER items will be delivered on a future invoice <== (Extended Amount represents item deposit amount)									
	A3418	1	0	CASE	___SOUP CHEF FRANCISCO BOSTON CLAM	1	60.0000	30.00D	
	A3578	1	0	CASE	___ SOUP CHEF FRANCISCO TOMATO	1	48.5138	24.26D	
Number of PCS.		2		Total WEIGHT		22.00		INVOICE TOTAL(\$)	310.26
Customer's Signature: _____									

Gross profit, discounts and other service charges are never applied to the deposit amounts. They are only calculated or applied when the special order or drop ship product actually ships.



Note

Setting the value of the Special Order Deposit Percent or the Drop Ship Deposit Percent to **-1** will instruct **entrée** to use the global deposit amounts defined in the [System Preferences entrée.DOT](#) tab.



Note

If a value other than the global amount should be used, the field should be set to a percentage value between 0 and 100.

- For more detailed information about Customer File Maintenance please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

Next go the entrée.DOT [Dot Foods Control Panel](#) and import Dot Foods items into entrée.

5.4 entrée Security Update

Only needed for entrée V3

Management Sales Review can be used to view pending sales and provides a historical view of sales for your Dot Foods items. Easily observe which products are selling well and use this information to adjust the items you import from the Dot Foods catalog.

Should you need to adjust the quantity of a special order item on an invoice after it is been purchased, you will need to use the Management Sales Review utility, which is accessible from the Dot Foods Control Panel.

Because of the nature of the pre-order process, certain restrictions are placed in invoicing and purchasing once a special order or drop ship item has been purchased that prevent the operator from changing the original quantities ordered on the invoice. The Management Sales Review utility allows for those special circumstance changes to be made, by an **authorized** person in your organization.

The use of the Management Sales Review utility must be enabled for specific user accounts in the **entrée Security Manager** before it can be used. This will ensure that only **authorized** personnel have access to update the original quantities ordered on invoices. Use the following procedure to perform these updates before accessing the Management Sales Review utility.



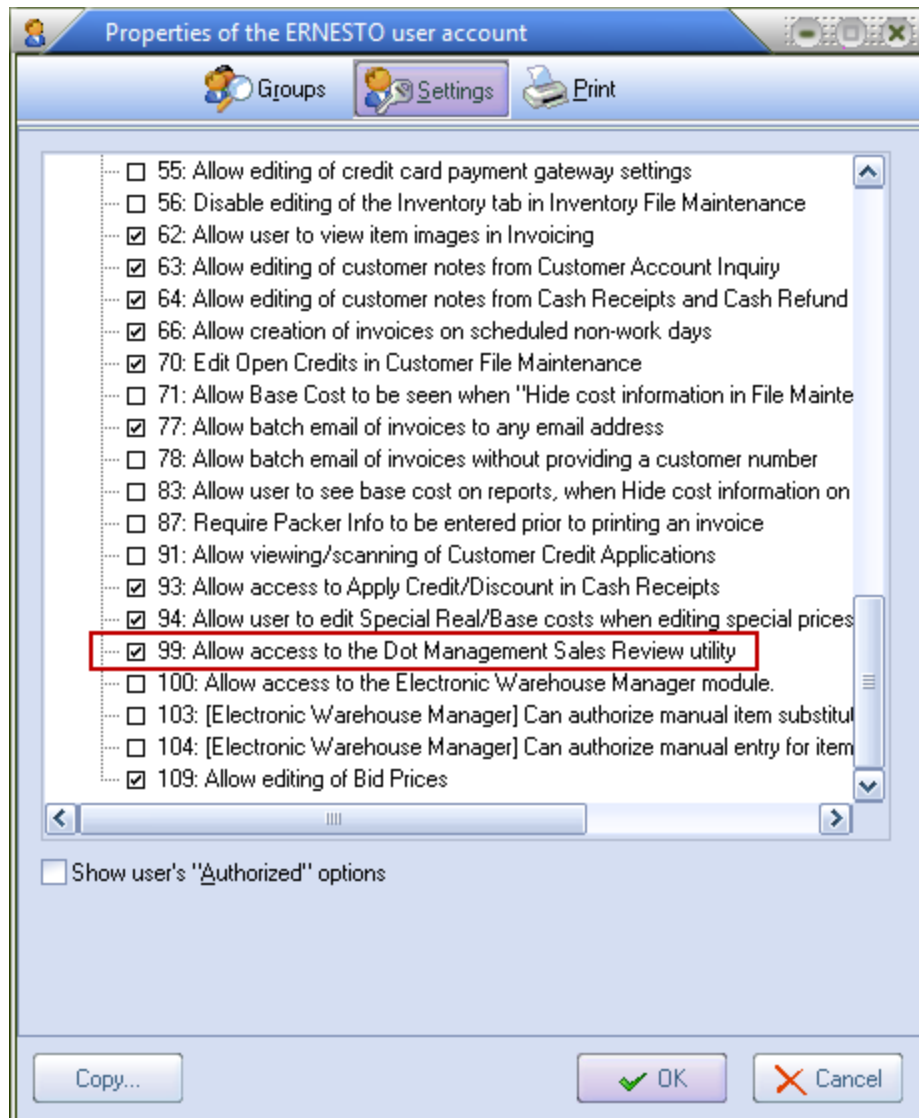
Note

Once an item has been delivered no additional changes are allowed.

Authorizing User Accounts for Management Sales Review

entrée V3

1. Use menu path: **System > Security Management**.
2. Click on the desired **User name** of the user account that will be authorized.
3. Click the **Edit** button and the Properties of the "name" user account dialog will open.
4. Click the **Settings** option.
5. Click on the plus sign **+** for the **Miscellaneous system options** node to expand the list.
6. Scroll to the bottom of the list and check **# 99 Allow access to the Dot Management Sales Review utility** option.



7. Click **OK**.
 8. Repeat this update process for each user account that will be given authorization.
 9. Click **Exit** to leave the security manager when your updates are done. Now your **authorized** personnel can utilize this utility.
- For more detailed information about Security Management please refer to the topic in either the [entrée V3 KnowledgeBase](#) in our website.

Chapter 6

Using entrée.DOT

6 Using entrée.DOT

Features of entrée.DOT

- The [Import Items](#) utility is provided to allow you to select and import items into your existing inventory **entrée** file.
- A **Preview Import** screen with filtering to exclude certain items from being imported, set various option switches per item / item group is provided.
- Items may be filtered during the import process by Brand, Buying Group, Category, Hazmat Items, IFDA Category, IFDA Class, Kosher Item, Stock Code and Temp. Zone (as defined in the Dot Foods data).
- The import process can automatically update costs and pricing in **entrée** based on your specific pricing data from Dot Foods and your [System Preferences](#) setup.
- Items which are imported and have no matching records in your Inventory File can be automatically created by **entrée** using the data from Dot Foods. This includes item number, description, unit of measure, etc.
- You will have an option **not** to have the system create new inventory records when matching records in your inventory file cannot be found. This will allow you to use the import feature simply for the purpose of updating costs and pricing, etc., only for existing / matching records.
- Only authorized personnel can access [Management Sales Review](#) to view past and pending sales to determine product sales trends. View all transactions related to selected line items with options to edit and delete items, and print the documents related to the selected line items.

The **Dot Foods Control Panel** provides all the functionality you will need to successfully integrate items from the Dot Foods catalog into your product line. Through the control panel you can:

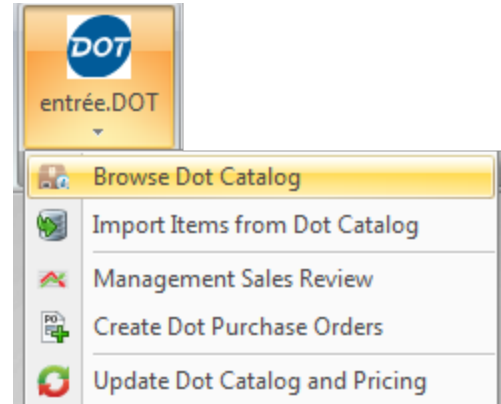
- Import items from your Dot Foods Order Guide via a fully automated FTP process using your existing Internet connection.
- Update item cost, price, and information for Dot Foods catalog items in a single click.
- Authorize personnel for Management Sales Review to view past and pending sales to determine product sales trends. View all transactions related to selected line items with options to edit and delete items, and print the documents related to those line items.
- Automatically build and export to Dot Foods your POs for Special Order and Drop Ship Items with options for date and vendor.
- Exit the Dot Foods Control Panel to easily continue with your work in the main **entrée** system.

Next in this chapter learn how to access the entrée.DOT Control Panel in entrée.

Accessing entrée.DOT entrée V4 SQL

1. Click the **Add-Ons** ribbon menu.
2. Click the **entrée.DOT** drop down menu.

This drop down menu is the new **entrée.DOT Control Panel**.



entrée V3

To run **entrée.DOT** from the main menu of the **entrée V3** use menu path:


**Inventory >
entrée.DOT
Control Panel.**



Now go to the [Importing Items from Dot Foods](#) topic to proceed with the import process.

6.1 Importing Items from Dot Foods

Import Process Overview

1. First complete the steps to setup **entrée.DOT**.
2. To access the **entrée.DOT Control Panel** option for importing items:
entrée V4 SQL Go to the **Add-Ons** ribbon menu > click the **entrée.DOT** drop down menu > **Update Dot Catalog and Pricing**.
entrée V3 Use menu path: **Inventory** > **entrée.DOT Control Panel** > select **Update items with new pricing from the Dot Foods Catalog**.
3. The utility will query the Dot Foods FTP site for their current catalog data. The current Dot Foods catalog will be downloaded to the database.
4. To load the catalog data from the database into the **Import Item Selection** screen.
entrée V4 SQL Click the **Import items from Dot Catalog** option.
entrée V3 Click the **Import items into entrée from the Dot Foods Catalog** option.
5. The first time you install the system and load the Dot Foods Catalog you *must* click the **Auto Link** button. This automatically links your **entrée** inventory items to items from the Dot Foods Catalog.
 **Note** You will only have to do the **Auto Link** process once. More information about **Auto Link** follows.
6. In the **Import Item Selection** screen use the Columns and Properties options to control the display of item information.
7. Use the **Filters** options in the Import Item Selection screen to find the Dot Foods items you would like to import into **entrée**. More information about using Filters follows.
8. Click the **Select?** box for all the items you would like to import into **entrée**. Click the **Continue** button.
9. The Item Import Configuration screen will display. You can keep the default settings from the System Preferences **entrée.DOT** tab you created in the setup process or make changes for the items in the *current* import process only. Click **Continue**.
10. The **Import Item Preview** screen will display.
 - a. Review how items will look in the **entrée** inventory file. You can update any item information *not* highlighted in blue.
 - b. Remove any items that you do not want imported at this time by clicking the “**X**” for the item.
 - c. Click **Add** to go back to the Import Item Selection grid and add new items to the list.
11. When the list of items to be imported is finalized and your edits are complete in the Import Item Preview screen, click the **Post** button. The new items from Dot Foods will be added to your **entrée** system inventory file.

12. Once Dot Foods items are in **entrée**, you can add Primary Vendor information to your items in [Inventory File Maintenance](#) on the **Vendor** tab.
13. Manufacturer information can also be added to **entrée**, in the [Manufacturer File Maintenance](#) feature.
14. Then manufacturers can be added to items in the [Inventory File Maintenance](#) **Vendor** tab.

**Note**

Adding the manufacturer information is optional.

15. To override the default settings for any individual Dot Foods item use the [Inventory File Maintenance](#) .DOT tab.
16. If you have **entrée.DSR** the Dot Foods the items will be available to your sales force in the inventory file.

**Note**

Since the [Electronic Order Pad](#) is replacing **entrée.DSR** Dot Foods items will also be available there.

17. If you have [entrée.NET](#) and/or [Electronic Order Pad](#) the Dot Foods items will be available in your product catalog if the setup steps required have been completed and the **Export to entrée.NET** update has been run. See the [Setup in entrée.NET](#) chapter of this guide for more information.

- **Now follow the step by step procedure that follows to import Dot Foods items.**

Learn about the many options and tools embedded in the Dot Foods Control Panel Import process.

First, Load the Dot Foods Catalog

1. Access the **entrée.DOT Control Panel**.

entrée V4 SQL Go to the **Add-Ons** ribbon menu > click the **entrée.DOT** drop down menu > **Update Dot Catalog and Pricing**.

entrée V3 Use menu path: **Inventory > entrée.DOT Control Panel > select Update items with new pricing from the Dot Foods Catalog**.

2. The utility will query the Dot Foods FTP site for their catalog.
3. The current Dot Foods catalog data files will be downloaded into the database.

- **Next, in the second step where you will select items for import.**

Second, Select Items for Import into entrée

1. To load the catalog data from the database into the **Import Item Selection** screen.

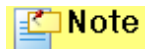
entrée V4 SQL Click the **Import items from Dot Catalog** option.

entrée V3 Click the **Import items into entrée from the Dot Foods Catalog** option.

2. A “loading” screen will display as the catalog data is loaded from the Dot Foods database.

3. The **Import Item Selection** screen will display all the items from Dot Foods.

4. If this is the first time you installed the system and loaded the Dot Foods Catalog click the **Auto Link** button.



Note

Skip step 4 **Auto Link** if this is *not* the first time importing the Dot Foods Catalog.

Select?	Description	Dot Item #	Brand	
<input type="checkbox"/>	SOUP CHEF FRANCISCO LUMBERJACK MIX	3635	HEINZ FROZEN	4.0
<input type="checkbox"/>	PASTRY VARIETY PACK 8 COUNT ELITE T	5515	SARA LEE BAKERY	6.0
<input type="checkbox"/>	CAKE CARROT SHEET 12X16 ICED 4 CASE	5764	SARA LEE BAKERY	4.0
<input type="checkbox"/>	CAKE VARIETY LAYERED UNCU 9" 4 CAS	5928	SARA LEE BAKERY	4.0
<input type="checkbox"/>	MUFFIN BLUEBERRY LARGE 4.25 OUNCE 4	6179	SARA LEE BAKERY	4.0
<input type="checkbox"/>	CROISSANT SLICED SANDWICH 2 OUNCE 4	6421	SARA LEE BAKERY	4.0
<input type="checkbox"/>	BROWNIE ICED INDIVIDUALLY WRAPPED 2	6688	SARA LEE BAKERY	24.
<input type="checkbox"/>	SOUP CHEF FRANCISCO BROCCOLI CHEESE	58496	HEINZ FROZEN	4.0
<input checked="" type="checkbox"/>	ENGLISH MUFFIN THOMAS ORIGINAL SAND	61503	THOMAS/BURRY FR...	48
<input type="checkbox"/>	PIZZA TONY'S PEPPERONI BULK 5" 54 CA	62320	SCHWAN'S	54.
<input type="checkbox"/>	PIZZA TONY CHEESE 5" BULK 54 CASE 4	62345	SCHWAN'S	54.
<input type="checkbox"/>	PIZZA TONY SUPREME 5" INDIVIDUALLY	62377	SCHWAN'S	24.
<input type="checkbox"/>	PIZZA TONY PEPPERONI 5" INDIVIDUALLY	62384	SCHWAN'S	24.
<input type="checkbox"/>	PIZZA TONY CHEESE 5" INDIVIDUALLY W	62402	SCHWAN'S	24.
<input type="checkbox"/>	GRAVY TURKEY LEGOUT 12 #5 CAN 49 OU	103308	UNILEVER FOODSO...	12.
<input type="checkbox"/>	CRACKER BURRY OYSTER SMALL 150 CASE	109243	BURRY FOODSERVI...	150
<input type="checkbox"/>	GLOBE SLICED WATER PACK APPLES 6 #1	110509	PINNACLE FOODS ...	6.0
<input type="checkbox"/>	SUGAR SUBSTITUTE EQUAL BLUE 2000 CO	146416	STRATAS-EQUAL	1.0
<input type="checkbox"/>	SUGAR PACKET GOLBON 2000 COUNT	165509	SUGAR & SUGAR P...	1.0
<input type="checkbox"/>	TONES BAKING POWDER 6 CASE 32 OUNCE	175364	TONE BROTHERS	6.0
<input type="checkbox"/>	OLIVE RIPE PITTED MEDIUM 6 #10 CAN	185554	IMPORTS	6.0
<input type="checkbox"/>	MIX CORN DOC 50 BOUND	261740	GENERAL MILLS DRV	1.0

Extended Information	
Item Codes	
Case UPC	004800194050
Hazmat Item	<input type="checkbox"/>
Kosher Item	<input checked="" type="checkbox"/>
Mfg Item #	94050
Piece UPC	048001940502
Stock Code	In Stock Item
UK UPC	10048001940502
Size	
Cubes	0.76 Cubic Feet
Gross Weight	10.50 Pounds
Height	7.50 Inches
Length	18.00 Inches
Net Weight	9.00 Pounds
Pack	48.00 / 3.00 Oun...
Width	9.75 Inches
Quantities	
Boxes per Layer	8
Incremental Qty	80
Layers per Pallet	10.00
Minimum Quantity	80
Ordering UOM	Case
Pallet Quantity	80.00
Pricing Info	
Effective Date	6/30/2011
Bracket 1	\$17.66 / 5,000.00

Import Item Selection Procedure

1. Use the **Properties** option to view all the information about an item in the Dot Foods catalog. The information is displayed in the Extended Information area.

Use the item's information to determine if the item meets your business requirements for: Net Days, Temp. Zone, Shelf Life, UOM, Weight, Height, Length whatever impacts your decision to add the item to your product catalog.

2. Use the **Columns** information to control what columns of data are displayed in this screen.
3. Use the **Filters** option in the Import Item Selection screen to sort through and target the Dot Foods items you would like to import into **entrée**. You will generate a preliminary list of items you would like to import from the Dot Foods catalog here.
4. Check the **Select?** column to make item selections. Or right click on **Select?** and a drop down menu will display with **Select All** and **Select None** as options. These items will move to the next step in the process. In the image above the items were filtered by Brand for all Kosher Items to make item selections.
5. Click **Continue** to proceed to the next step in processing your item list.

Import Item Selection Overview

The Import Item Selection grid contains all of the items in the Dot Foods catalog that have *not* yet been imported into the **entrée** Inventory file.

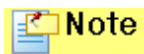
Clicking on any column heading will sort the items in the grid by the selected column, which is indicated by a light blue line above the column heading with an arrow point up or down, depending on if the sort is in ascending or descending order.

Place a check in the **Select?** column for items that should be imported into the **entrée** inventory file.

Right clicking the **Select?** column heading will open a drop down menu allowing you to select all or clear the selected state of all items in the grid.

Buttons:

- **Home** button will return you to the Dot Control Panel *without* importing any items.
- **Continue** button proceeds to the next step in the import process.
- **Auto Link** button - The first thing that should be done when this screen is opened for the first time is to click the **Auto Link** button. This will scan through the current items defined in **entrée** and attempt to match them to the corresponding item in the Dot Foods Catalog file. The matching process looks at the assigned vendors for each item. If the item is assigned to a vendor that has been flagged as a “Dot Foods” vendor, the assigned vendor item number will then be cross referenced in to the Dot Foods Catalog. If a match is found, **entrée** will consider the items to be linked. Once an **entrée** item has been linked to an item in the Dot Foods Catalog, it will not be displayed again in the Import Item Selection grid.

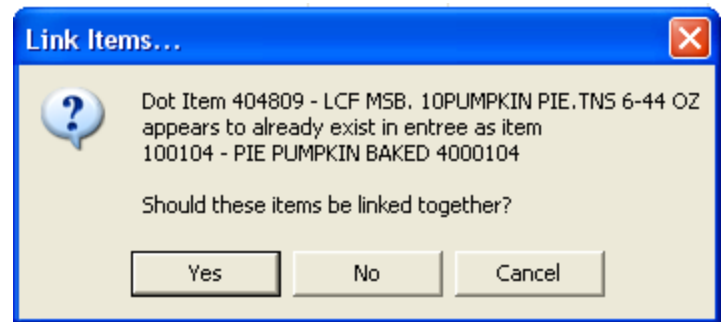


The Auto Link process only needs to be done once when the system is first installed.

Browsing through items in Inventory File Maintenance will automatically link to the Dot Foods Catalog based on the same technique.

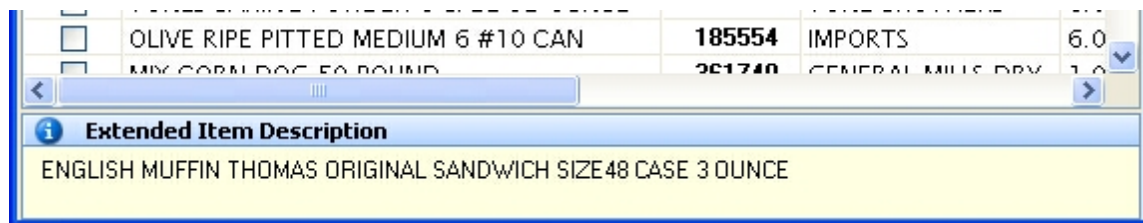
Should you choose not to perform the Auto Link process, each item displayed in the Import Items Selection grid will also be analyzed for a potential existing match in the **entrée** database when it is “checked” to be imported into the **entrée** system. If a potential match is found a dialog box similar to the one displayed below will be presented to confirm how the item should be handled.

- Click **Yes** to link the existing **entrée** item to the item in the Dot Foods Catalog.
- Click **No** to import the item as a new **entrée** item.
- Click **Cancel** to “Uncheck” the item and not do anything at this time.



Extended Item Description

Directly beneath the items grid is an area that displays the full extended item description for the currently selected item in the grid. The description column in the grid also displays the extended item description, but only the first 35 characters are displayed indicating what the description would look like once the item is imported into **entrée**. Any remaining characters in the extended description of the item would be rolled into description lines 2 - 4 as needed when the item is actually imported.



Extended Information Area Overview

Along the right edge of the dialog is the Extended Information area. This area contains controls for filtering and searching the products in the Dot Catalog, configuring the columns that are displayed in the items grid and additional information about an item that is may not be currently displayed in the grid.

At the bottom of the Extended Information area are three buttons: **Properties**, **Filters** and **Columns**. The display of information in this area will change with the button selected. Detailed explanations about the use of these buttons to find items in the Dot Foods catalog follow.

This panel can be collapsed by clicking the double >> symbol in the top right corner of the form, making room for more columns of data in the items grid. Once collapsed, clicking the << icon will cause the Extended Information area to be expanded back into view.

Properties

This area will convey information about the currently selected item in the grid as defined in the Dot Foods catalog file. This information can be accessed by clicking the **Properties** button at the bottom of the Extended Information area.

By default data is broken out into categories, such as Item Codes, Size, and Pricing Info. Categories will be displayed in **bold** text with a blue gradient background and have a **-** or **+** button to the left of the category title text. These buttons will collapse that category to make room for additional data to be displayed or expand the category so the sub-properties become visible.



Directly above the properties grid, there are two buttons used for altering how the data is displayed in the properties grid.



Clicking the button with the large **A** will remove all of the category headings, and sort the properties into a single list, sorted alphabetically.



Clicking the button with the tree nodes icon will put the properties grid back into a category based list.

Extended Information >>	
 	
Item Codes	
Case UPC	007008516524
Hazmat Item	<input type="checkbox"/>
Kosher Item	<input type="checkbox"/>
Mfg Item #	165240
Piece UPC	070085165243
Stock Code	In Stock Item
UK UPC	10070085165243
Size	
Cubes	0.49 Cubic Feet
Gross Weight	17.00 Pounds
Height	7.10 Inches
Length	19.80 Inches
Net Weight	16.00 Pounds
Pack	4.00 / 4.00 Pounds
Width	6.00 Inches
Quantities	
Boxes per Layer	10
Incremental Qty	15
Layers per Pallet	15.00
Minimum Quantity	15
Ordering UOM	Case
Pallet Quantity	150.00
Pricing Info	
Effective Date	6/30/2011
Bracket 1	\$40.08 / 5,000.00
Bracket 2	\$40.00 / 10,000.00
Bracket 3	\$40.00 / 20,000.00
Bracket 4	\$40.00 / 40,000.00
Price UOM	Case
Price By	DELIVERY DATE
Terms	
Discount Days	10
Discount Percent	0.00
Net Days	11
Taxable	<input type="checkbox"/>
Miscellaneous	
Buying Group	INDEPENDENT FOO...
Category	CHEF FRANCISCO
Crush Code	77 -UPPER RANGE ...
IFDA Category	Soups
IFDA Class	Vegetable Soup, Froz...
Inner Pack	0.00
Line Description	HEINZ FROZEN
Shelf Life	730 days
Temp. Zone	Frozen

Properties	Filters
	Columns

Filters

Simply use the Filters options to sort through the catalog and pinpoint new items, brands, what-ever you need to support your business growth. Click the **Filters** button at the bottom of the Extended Information area to access the filter options.

You can filter by any combination from: Brand, Buying Group, Category, Hazmat Items, IFDA Category, IFDA Class, Kosher Item, Stock Code and Temp. Zone.

After clicking the **Filters** button, three sub groups will be displayed in the Extended Information area, **Search**, **Configurations**, and **Item Filters**.

1. Search

The most basic method of filtering is a simple search which can be performed in the first group entitled "Search". This will default to Description, but there are many other columns that may be searched which can be accessed by selecting the desired column to search from the drop down control. Beneath the drop down control is where you will enter the word or phrase to search for.

Finally click the **Go** button and the item grid will then only display the items in the Dot Foods catalog that meet the search criteria. The search is performed using a "contains" method on the selected column so the search expression can exist anywhere in the column searched.

To clear an existing search, simply clear out the search expression and click the **Go** button again.

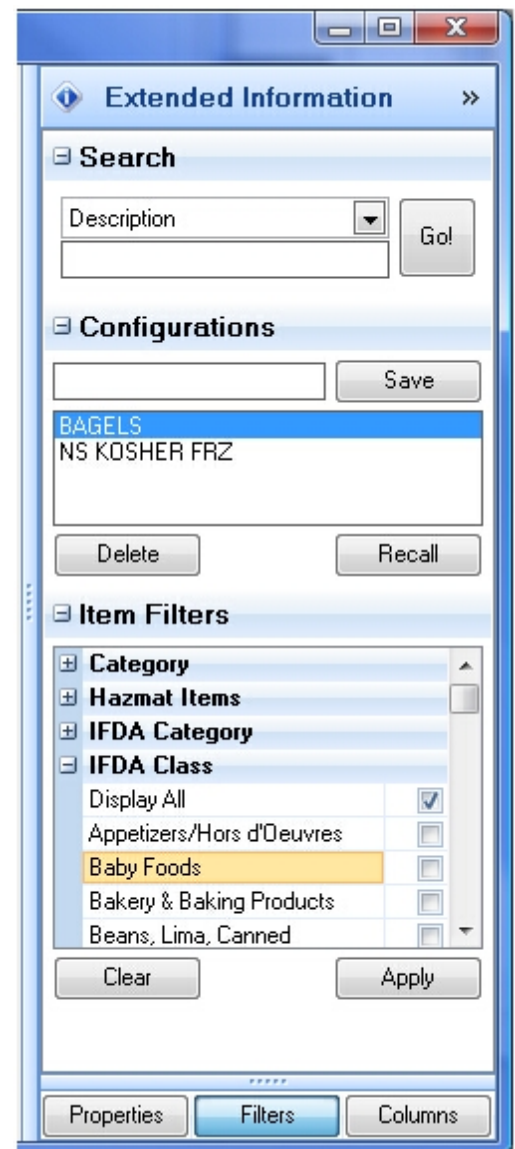
2. Configurations

The current Item Filter conditions can be saved and recalled at a later time similar to a report configuration.

To save a configuration type the desired name for the configuration in the text box to the left of the save button, and click **Save**.

Once that is done the configuration will be displayed in the Configuration list.

- Clicking the **Recall** button will restore the currently selected configuration and load the qualifying items into the items grid.
- Clicking the **Delete** button will delete the currently selected configuration.



3. Item Filters

You can filter by any combination from: Brand, Buying Group, Category, Hazmat Items, IFDA Category, IFDA Class, Kosher Item, Stock Code and Temp. Zone. The items that are displayed in the grid can also be filtered using an advanced filtering method.

- In the **Item Filters** list click the **+** to view the sub-group of filters.
- Or click on the Brand, Category, IFDA Category, IFDA Class filter and open the **Select** dialog box to list the filtering options.
- Once your filter conditions are set, click the **Apply** button to update the items in the grid using your filtering selections.
- Click the **Clear** button to remove all existing filter conditions and display the full Dot Foods catalog again.

How Brand, Category, IFDA Category, IFDA Class Item Filters use the Select dialog box

- Click on the Item Filter name and the **Select** button is displayed.
- Click the **Select** button and the Select dialog box will display with the filtering options.

The screenshot shows a dialog box titled "Item Filters". The "Brand" filter is selected and highlighted in yellow, with a "Select" button next to it. Below it are other filter categories: "Buying Group", "Category", "Hazmat Items", "IFDA Category", "IFDA Class", "Kosher Item", "Stock Code", and "Temp. Zone". The "Hazmat Items" section is expanded, showing a table with three rows: "Display All" (selected with a green dot), "Yes", and "No". At the bottom of the dialog box are "Clear" and "Apply" buttons.

- c. Check the **Select?** box for the options you would like use as filters for the items in the Dot Foods catalog.
- d. Click **OK**.
- e. Click **Apply** in the Item Filters section.



Example

- **Let's say you want to expand your product line to offer Kosher products. Here is how you can do it...**
 - Go to the Item Filters section and select "Kosher", click **Yes** then click **Apply**.
 - Now only the items that are Kosher will be displayed in the Import item Selection screen.
 - Select items for your new Kosher product line by checking the **Select?** box.
- **To save the current search in the Configurations section:**
 - Type a name in the text box, here we used "KOSHER".
 - Click the **Save** button.
- **Now when you want to quickly see the Kosher items list in the Dot Foods catalog:**
 - Click on the saved "KOSHER" configuration
 - Click the **Recall** button. The list of only Kosher items will be displayed.

You can save configurations for the groups of items, brands whatever items you commonly search for in the Dot Foods catalog.

The image below shows the filtering options and results for the Kosher item search. You can see the “KOSHER” Configuration has been saved for one click item searches in the future.

The screenshot displays the 'Dot Foods Control Panel - [Import Item Selection]' interface. The main area contains a table of search results with columns for 'Select?', 'Description', 'Dot Item #', and 'Brand'. The table lists various bakery items, including pastries, cakes, muffins, and sandwiches, with their respective item numbers and brands. A sidebar on the right provides filtering options under 'Extended Information', including a search field, a 'Configurations' section with a 'KOSHER' configuration saved, and 'Item Filters' for IFDA Category, IFDA Class, Kosher Item (set to 'Yes'), Stock Code, and Temp. Zone. A 'Properties' section at the bottom left shows the extended description for the selected item: 'BROWNIE ICED INDIVIDUALLY WRAPPED 24 CASE 2.5OUNCE'.

Select?	Description	Dot Item #	Brand	
<input type="checkbox"/>	PASTRY VARIETY PACK 8 COUNT ELITE T	5515	SARA LEE BAKERY	6.00
<input type="checkbox"/>	CAKE CARROT SHEET 12X16 ICED 4 CASE	5764	SARA LEE BAKERY	4.00
<input type="checkbox"/>	CAKE VARIETY LAYERED UNCUT 9" 4 CAS	5928	SARA LEE BAKERY	4.00
<input type="checkbox"/>	MUFFIN BLUEBERRY LARGE 4.25 OUNCE 4	6179	SARA LEE BAKERY	4.00
<input type="checkbox"/>	CROISSANT SLICED SANDWICH 2 OUNCE 4	6421	SARA LEE BAKERY	4.00
<input type="checkbox"/>	BROWNIE ICED INDIVIDUALLY WRAPPED 2	6688	SARA LEE BAKERY	24.00
<input type="checkbox"/>	ENGLISH MUFFIN THOMAS ORIGINAL SAND	61503	THOMAS/BURRY FR...	48.00
<input type="checkbox"/>	CRACKER BURRY OYSTER SMALL 150 CASE	109243	BURRY FOODSERVI...	150.00
<input type="checkbox"/>	TUNA CHUNK LIGHT TONGOL POUCH 6 CAS	381312	CHICKEN OF THE S...	6.00
<input type="checkbox"/>	MIX MUFFIN FANCY BRAN 50 POUND	382363	FRESH START BAKE...	1.00
<input type="checkbox"/>	BROWNIE FABULOUS CHOCOLATE CHUNK 18	382630	SWEET STREET DES...	4.00
<input type="checkbox"/>	KETTLE BRAND TIAS! NACHO CHEDDAR 24	535064	KETTLE FOODS	24.00
<input type="checkbox"/>	KETTLE BRAND TIAS! SALSA PICANTE 24	535066	KETTLE FOODS	24.00



Note

Test data used above does not represent the full Dot Foods catalog in search results.

Columns

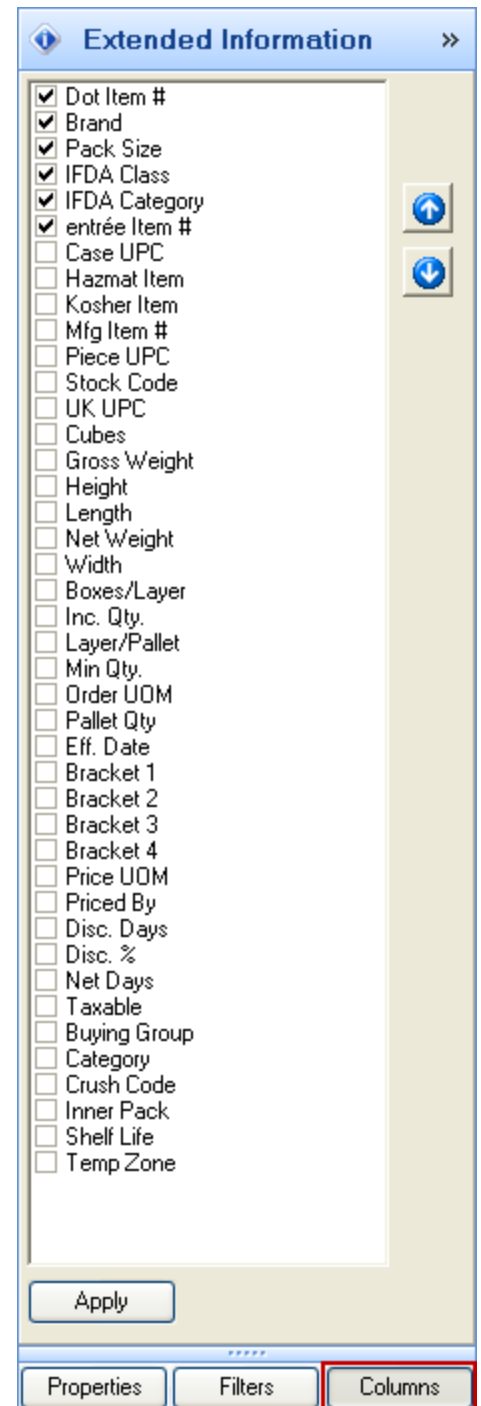
Clicking the **Columns** button in the Extended Information area, will invoke the Items Grid layout configuration panel.

Each of the available columns that can be displayed in the Items grid is listed. Columns that are checked will become visible in the grid and unchecked columns will be hidden. Columns will be displayed left to right in the grid, starting with the first checked column in the list.

Columns may be moved within the list by using the Up and Down arrow buttons on the Columns Layout editor or using a Drag and Drop method. Using the keyboard, the currently selected column can be moved using the Ctrl-Up or Ctrl-Down keyboard shortcuts.

When the column order is set, click the **Apply** button to update the Items Grid. The displayed column in the list will also be re-sequenced so that all of the “checked” columns will be displayed at the top of the list.

The column configuration is bound to the **entrée** user account and automatically saved when the **Apply** button is clicked. This means **entrée** will remember your desired column layout the next time items are imported from the Dot Catalog file.



Third, Assign the Import Item Configuration Defaults

After the items to import have been selected and the **Continue** button is clicked, as detailed in the second step, the Import Item Configuration screen will be displayed.

These values will initially be set to the defaults you defined in **System Preferences** on the **entrée.DOT** tab during the setup process, but can be overridden for the **current** batch of items being imported into **entrée**.

Dot Foods Control Panel - [Import Item Configuration]

Home Defaults Back Continue

Basic Item Information

Import item numbers: Use the Dot Foods item number

Item number prefix: Z

Import item description: Use the extended item description

Item Grouping

Brand Import Field: Line Description

Class Import Field: IFDA Class

Category Import Field: IFDA Category

Group Import Field: Manual Default: DOT FOODS

Special Codes

Item Misc. Code: D Position: 1

Kasher Misc. Code: K Position: 2

Hazmat Misc. Code: H Position: 3 Hazmat Comment:

Matrix Code: DF

Import Item Numbers

Specify how the entrée item number should be assigned when items are imported.

Select **Use the Dot Foods item number** to automatically assign the entrée item numbers.

Dot Foods item numbers are up to 7 character numeric ID's

When using the Dot Foods item number, you can prefix a single character such as the letter D, to the Dot Foods item number. This will keep all of the Dot Foods item number grouped together and help eliminate conflicts with existing entrée item numbers.

Select **Manually key in the entrée item number**, if you want to manually assign every entrée item number.

Buttons:

- **Home** button will return you to the Dot Control Panel **without** importing any items into the **entrée** database.
- **Defaults** button will reload the system defaults for importing items (as defined in System Preferences).
- **Back** button will return you to the Import Item Selection screen.
- **Continue** button goes to the next step in the import process, Import Item Preview.
- When you click in a field a description will be displayed in the information section on the right.
- When you click on the drop down arrow for a field the options are listed.

Processing Import Configuration Defaults

1. Check the import configuration settings. Keep the defaults or make changes required for the current import.
2. Once the import configuration settings for the current import are set, click the **Continue** button to proceed to the next step in the import process the **Import Item Preview**.

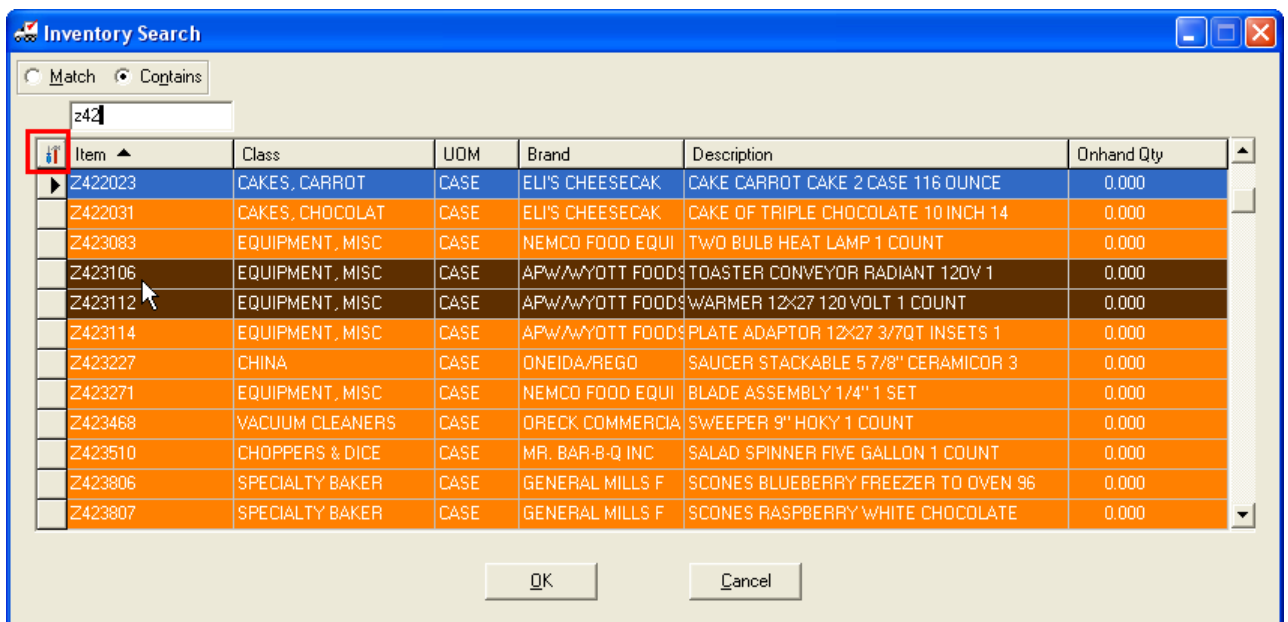
entrée V4 SQL

After the Dot Foods catalog items are posted in **entrée V4 SQL** by default Special Order Items are displayed in orange text on white background and Drop Ship items are displayed in brown text on white background.

entrée V3

After the Dot Foods catalog items are posted in **entrée** the special order (orange) and drop ship (brown) items will be easy to identify in your **entrée V3** Inventory Search screen because of their highlight colors (see image below).

- See the [entrée.DOT Tab](#) chapter **Inventory Search Screen Colors & Dot Items** section of this guide for more information about the use of the Tools button to customize the highlight colors of your Dot Foods items.



- **How can you use Import Configuration to manage how you import selected Dot Foods items**

Lets say you wanted to import items with a Temp. Zone of frozen and identify these items with a unique item number prefix of "F" because you already use that item prefix in your inventory file for all frozen items.

- Select **only** the specific frozen items from the Dot Foods catalog for import.
- Then when you get to the Item Import Configuration screen you will customize the Item Number Prefix value.
- Enter the desired Item Number Prefix value in the text box. In this example the letter "F" was used to indicate frozen items.

- d. Then click the **Post** button to post the items to the **entrée** system.

Item #	Description	Dot Item Type	UOM	Brand	Pack Size	Onhand Qty
F381615	MEAT SUBSTITUTE MORNINGSTAR	Special Order	CASE	KELLOGG'S FROZE	1/104 CNT	0.000
F381627	MEAT SUBSTITUTE MORNINGSTAR GARDEN	Special Order	CASE	KELLOGG'S FROZE	4/48 CNT	0.000
F381630	MEAT SUBSTITUTE MORNINGSTAR CHIK'N	Special Order	CASE	KELLOGG'S FROZE	12/2.5 OZ	0.000
F381633	MEAT SUBSTITUTE BLACK BEAN BURGER	Special Order	CASE	KELLOGG'S FROZE	4/3.25 OZ	0.000

- e. After the items have been imported into **entrée** you can easily identify the Dot Foods items in your inventory search results. The orange highlighted special order items are from Dot Foods and they now have the same “F” prefix as the distributor’s stock frozen items as shown in the Inventory Search image.

Item	Class	UOM	Brand	Description	Onhand Qty
F1245	NOVELTIES	CASE	MINUTE MAID	SHAPE UP CHERRY 72-3.1oz #3830	0.000
F1246	NOVELTIES	CASE	MINUTE MAID	SHAPE UP GRAPE 72-3.1 OZ #3832	0.000
F169021	NOVELTIES	CASE	CRYSTAL	VF NUTTY SUNDAE VANILLA 12/6pk	3.000
F3748	NOVELTIES	CASE	MINUTE MAID	SHAPE ** UP PINK LMNDE 4018	0.000
F381615	FOOD PRODUCTS,	CASE	KELLOGG'S FROZE	MEAT SUBSTITUTE MORNINGSTAR	0.000
F381627	FOOD PRODUCTS,	CASE	KELLOGG'S FROZE	MEAT SUBSTITUTE MORNINGSTAR GARDEN	0.000
F381630	FOOD PRODUCTS,	CASE	KELLOGG'S FROZE	MEAT SUBSTITUTE MORNINGSTAR CHIK'N	0.000
F381633	FOOD PRODUCTS,	CASE	KELLOGG'S FROZE	MEAT SUBSTITUTE BLACK BEAN BURGER	0.000
F80025	ICE CREAM	TUB	CRYSTAL	ICE CREAM MANGO	1.000
F80033	ICE CREAM	TUB	CRYSTAL	ICE CREAM ROCKY ROAD	4.000
F80193	ICE CREAM	TUB	CRYSTAL	ICE CREAM PRALINES & ALMOND 3-GAL	3.000
F80343	ICE CREAM	TUB	CRYSTAL	ICE CREAM CHOC CHIP 3-GAL	3.000

Fourth, Preview and Post Items to entrée

The **Import Item Preview** screen is your last chance to make changes to items before you import them into **entrée**. Most of the values displayed in this screen can be modified on a per item basis by highlighting the field to be changed and entering the new values.

Most values that are displayed in this grid can be modified on a per item basis by highlighting the field to be changed and entering the new values.

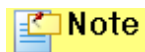
Columns that are highlighted in blue; Real Cost, Base Cost, Gross Wgt., Cubes, Dot Item#, Mfg. Item#, Skid Qty, Layer Cnt, Tier Cnt, and UPC Code values contain data values that may *not* be changed .

Item #	Description	Real Cost	Freight	Markup %	Base Cost	Min Sell \$	Pr
Z460976	BAGEL PARBAKED SESAME SEED 60 CASE	18.8100	0.0000	17.0000	22.0077	22.0077	
Z460978	BAGEL PARBAKED EVERYTHING 60 CASE 4	18.8100	0.0000	17.0000	22.0077	22.0077	
Z460973	BAGEL PAR BAKED PLAIN 60 CASE 4	17.1400	0.0000	17.0000	20.0538	20.0538	
Z460981	BAGEL PARBAKED CINNAMON RAISIN 40	13.8200	0.0000	17.0000	16.1694	16.1694	
Z460979	BAGEL PARBAKED WHEAT 60 CASE 4	18.8100	0.0000	17.0000	22.0077	22.0077	
Z449826	TOPPING BROWNIE CHOCOLATE FUDGE	30.0600	0.0000	17.0000	35.1702	35.1702	
Z445973	DESSERT SUMMERBERRY STACK 8 CASE	111.0900	0.0000	17.0000	129.9753	129.9753	
Z404809	MRS. SMITH'S 10PUMPKIN PIE.TNS 6	30.0000	0.0000	17.0000	35.1000	35.1000	
Z455242	BAGEL WHOLESOME INDULGENCE 100%	30.2700	0.0000	17.0000	35.4159	35.4159	
Z448843	BREAD GARLIC BREADSTICKS 100 COUNT	30.7300	0.0000	17.0000	35.9541	35.9541	
Z419909	COOKIE DOUGH GOURMET OATMEAL RAISIN	50.6500	0.0000	17.0000	59.2605	59.2605	
Z419921	COOKIE DOUGH GOURMET OATMEAL RAISIN	50.6500	0.0000	17.0000	59.2605	59.2605	
Z419918	COOKIE DOUGH GOURMET CHOCOLATE CHIP	50.6500	0.0000	17.0000	59.2605	59.2605	
Z454481	SWEET DISCOVERY OATMEAL RAISIN	60.4300	0.0000	17.0000	70.7031	70.7031	
Z419936	COOKIE DOUGH WHITE CHOCOLATE	62.7600	0.0000	17.0000	73.4292	73.4292	
Z419923	COOKIE DOUGH GOURMET PEANUT BUTTER	50.6500	0.0000	17.0000	59.2605	59.2605	
Z454312	SWEET DISCOVERY MEDIUM CHOCOLATE	60.4300	0.0000	17.0000	70.7031	70.7031	
Z454307	MUFFINS CHOCOLATE CHOCOLATE CHIP	35.7500	0.0000	17.0000	41.8275	41.8275	
Z454480	SWEET DISCOVERY CHOCOLATE CHIP	60.4300	0.0000	17.0000	70.7031	70.7031	
Z454330	SWEET DISCOVERY MEDIUM PEANUT	60.4300	0.0000	17.0000	70.7031	70.7031	
Z454304	MUFFINS WILD BLUEBERRY BULK 48 CASE	35.7500	0.0000	17.0000	41.8275	41.8275	
Z419903	COOKIE DOUGH WHITE CHOCOLATE	62.7600	0.0000	17.0000	73.4292	73.4292	
Z454306	MUFFINS BANANA NUT BULK 48 CASE 4	35.7500	0.0000	17.0000	41.8275	41.8275	

Extended Item Description
BAGEL PARBAKED SESAME SEED 60 CASE 4 OUNCE

Buttons:

- **Home** button will return you to the Dot Control Panel *without* importing any items into the **entrée** database.
- **Add** button will keep the existing set of items to be imported. It will then return you to the Import Item Selection screen to select additional items to be imported.



The **Add** feature is useful when applying different default values to subsets of items in the Dot Foods catalog without having to restart the import process from the main Dot Foods Control Panel for each batch of items.

- **Back** button will return you to the Import Item Configuration defaults dialog.
- **Post** button will post the items displayed in the Import Item Preview screen into the **entrée** database. Then it will return you to the main Dot Control Panel.
- **Next** you will post the finalized item list into **entrée**.

Posting the final list of Dot Foods Items into entrée

1. Click the **X** in the first column of the items preview grid to **remove** any item you do not want to import. The item will be returned to the Import Item Select grid and will not be imported at this time.
2. Use the **Add** button to go back to the Import Item Selection grid and get new items.
3. Edit the information for the remaining items that you will import into **entrée**. Columns you may **not** modify will be **highlighted in blue**. Other columns can be edited at this time prior to importing into **entrée**.
4. Once edits are done and all the items you need are on the list, click the **Post** button to import the items into your **entrée** inventory database.
5. Now the items selected from the Dot Foods catalog are available for sale in your Inventory File.



Note

If you have [entrée.NET](#) and/or [Electronic Order Pad](#) or [entrée.DSR](#), the next time you run the catalog export from **entrée** the Dot Foods items will be included.

6.2 Updating Dot Foods Items

During initial setup of **entrée.DOT** you will run the **Update Catalog & Pricing** utility to load the full Dot Foods catalog into the **entrée.DOT** database as described in the [Importing Dot Foods Items Overview](#).

Once items from the Dot Foods catalog have been imported into **entrée** they must be kept up to date. This is done by running the **Update Dot Catalog & Pricing** utility in the Dot Foods Control Panel daily. Clicking this option will begin a query of the FTP site defined in System Preferences FTP settings for an updated catalog and pricing file. Should one of these files be found it will automatically be imported. No further action is required to complete the update process. If there are no update files available a message will be displayed as seen in the image here.

IMPORTANT: This utility must be *run once a day* to keep the catalog and pricing data from Dot Foods current.

Access entrée.DOT to update prices for Dot Foods items

1. To access the **entrée.DOT Control Panel** option:

entrée V4 SQL Go to the **Add-Ons** ribbon menu > click the **entrée.DOT** drop down menu > select **Update Dot Catalog and Pricing**.

entrée V3 Use menu path: **Inventory > entrée.DOT Control Panel > select Update items with new pricing from the Dot Foods Catalog**.

2. If your files are current a message indicating that there are no new files to import will be displayed, other-wise an update to the Dot Foods database is performed.

8 Tier Pricing

The Dot Foods Pricing Catalog now supports 8 tiers of pricing. Most distributors typically use only tiers 1 through 4, low-volume pricing has been added in tiers 5 through 8. With tier 5 being the lowest volume/highest cost price and tier 8 one level below tier 1. This arrangement for the pricing information was used to avoid creating a conflict with the price information in the Catalog Pricing and Catalog Future Pricing data tables.

Price Breaks and 8 Tier Pricing

With 8 Tier Pricing came an update to the way tier pricing is applied when using Dot Catalog pricing. Previously, price breaks were being evaluated on a "per line-item" basis, meaning that the weight of a single line item would have to cross the weight threshold before a price break was applied to that one item.

Create/Change Purchase Order has been updated so that, if [System Option #174](#) - "Use pricing from Dot Foods catalog when creating Purchase Orders" is enabled, then the "Unit Cost" and "Extended Amount" values for all items will immediately be reviewed and recalculated as necessary whenever the total weight of the entire order exceeds the threshold for receiving a price break.

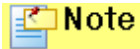
Future Catalog Pricing Feature

When pricing information is being imported in **entrée.DOT** it will be placed into a "future price" file instead of going directly to the active Dot Price File. After all of the pricing data has been imported into **entrée.DOT** the data will be reviewed and any prices which are currently in effect will automatically be transferred to the active Dot Price File.

6.3 Build / Export Purchase Orders to Dot Foods

Dot Foods Item Cost Default Values in Create/Change Purchase Order

The cost look-up process in Create/Change Purchase Order has been updated to add a system default for the cost value of Dot Foods items on POs for specific situations. When processing a Dot Foods item, the system will default the Purchase Order cost to the **last purchase cost**, if a *valid price cannot* be located in the Dot Price File.



Note Create/Change Purchase Order has been updated so that, if [System Option #174](#) - "Use pricing from Dot Foods catalog when creating Purchase Orders" is enabled, then the "Unit Cost" and "Extended Amount" values for all items will immediately be reviewed and recalculated as necessary whenever the total weight of the order exceeds the threshold for receiving a price break.

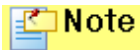
APO must meet the following requirements to be eligible to be exported to Dot Foods

- It cannot have already been sent to Dot Foods.
- It must not be received or closed.
- It cannot be a Supplemental PO.

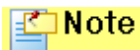
Using the entrée.DOT Purchase Orders Utility

The Purchase Orders utility allows you to:

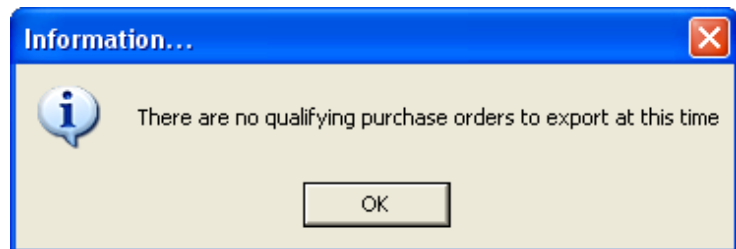
- Export existing purchase orders that have been created in **entrée** to Dot Foods via FTP.
- Automatically generate purchase orders for both special order and drop ship purchases.



Note This utility is the **only** means of generating purchases orders for items that are **drop shipped** to an **entrée** customer.



Note The **Build and Export Purchase Orders** utility will display a "No qualifying data to export" message when there are no documents to be sent to indicate the successful completion of the export.



Exporting Existing Purchase Orders Overview

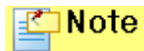
1. To access the **entrée.DOT Control Panel Purchase Orders** option:

entrée V4 SQL Go to the **Add-Ons** ribbon menu > click the **entrée.DOT** drop down menu > select **Create Dot Purchase Orders**.

entrée V3 Use menu path: **Inventory > entrée.DOT Control Panel > select Build and Export Purchase Orders**.

2. Check the **Export existing purchase orders** option to process existing Dot Foods purchase orders and export via FTP.
3. You may optionally specify a date range, which is validated against the purchase orders **required date** in the **Data From / To** fields.


4. You may optionally specify the Dot Vendors, which have existing purchase orders to export in the **Vendor** field.

**Note**

Leaving the **Vendor** filter empty will export all qualifying POs for Dot Foods vendors.

5. You may also specify a purchase order number in the **PO Number** field for the purchase orders that should be exported in the PO Number field.



- a. Click the **Vendor** or **PO Number** search tool  to open the search dialog box to select a value.

entrée V3

Vend #	Company	Phone	Contact
DOT	DOT FOODS, INC DRY	800/366-3687	DOT DRY
DOTEQ	DOT FOODS, INC EQP	800/366-3687	DOT EQUIPMENT
DOTFRZ	DOT FOODS, INC FRZ	800/366-3687	DOT FROZEN

6. Click **Continue** and automatically your POs are built and sent to Dot Foods in the background.
7. A Status message box will display with the number of POs uploaded to Dot Foods for all three export options when the export has completed.

Auto Generating Purchase Orders

In the **Export existing purchase orders** option purchase orders can also be automatically generated for any existing special order or drop ship items that have been ordered by a customer.

- **Export required "Drop Ship" Items**

When this option is checked a **single** PO will be created for each customer that has drop ship items that have been pre-ordered.

The **primary** Dot Foods vendor, as defined in System Preferences, will be used as the vendor for all the Drop Ship purchase orders.

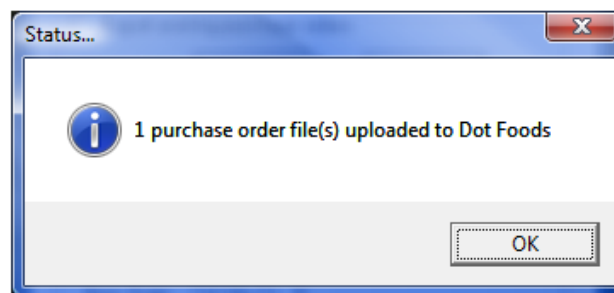
Drop Ship PO's will be shipped to the the Ship To customer address as defined on the invoice when the product was pre-ordered.

- **Export required "Special Order" Items**

When this option is checked a PO will be created for **each qualifying Dot Foods vendor** that has pre-order product pending.

- You may optionally specify the PO Required Date in the **Req. Date** field.
- You may also specify a valid vendor list in the Vendor field. When the vendor filter is used any Dot Foods vendor that does not meet the filter requirements will be excluded, even if there are pending pre-order items to be ordered from that Dot Vendor.

- Once the desired options have been selected in the **Export existing purchase orders** dialog click the **Continue** button.
- When the PO data has been collected and exported a message will be displayed indicating how many purchase orders were exported to Dot Foods.



Note

Should you choose not to export the PO to Dot Foods via FTP during the **entrée** purchase order process, FTP can be done later using this **Build and Export Purchase Orders** utility.

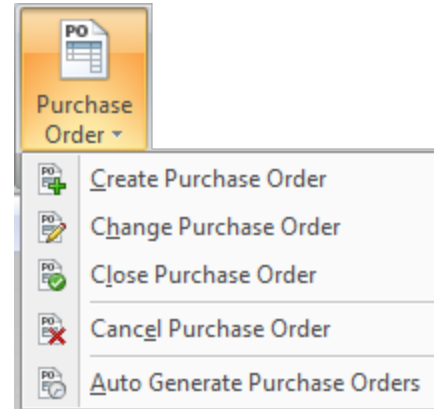
Manually Using entrée Purchasing for Dot Foods Items

When you have a combination of items to order from Dot Foods use the **entrée** Create Purchase Order and Change Purchase Order.

- To access the **entrée Purchase Order** features:

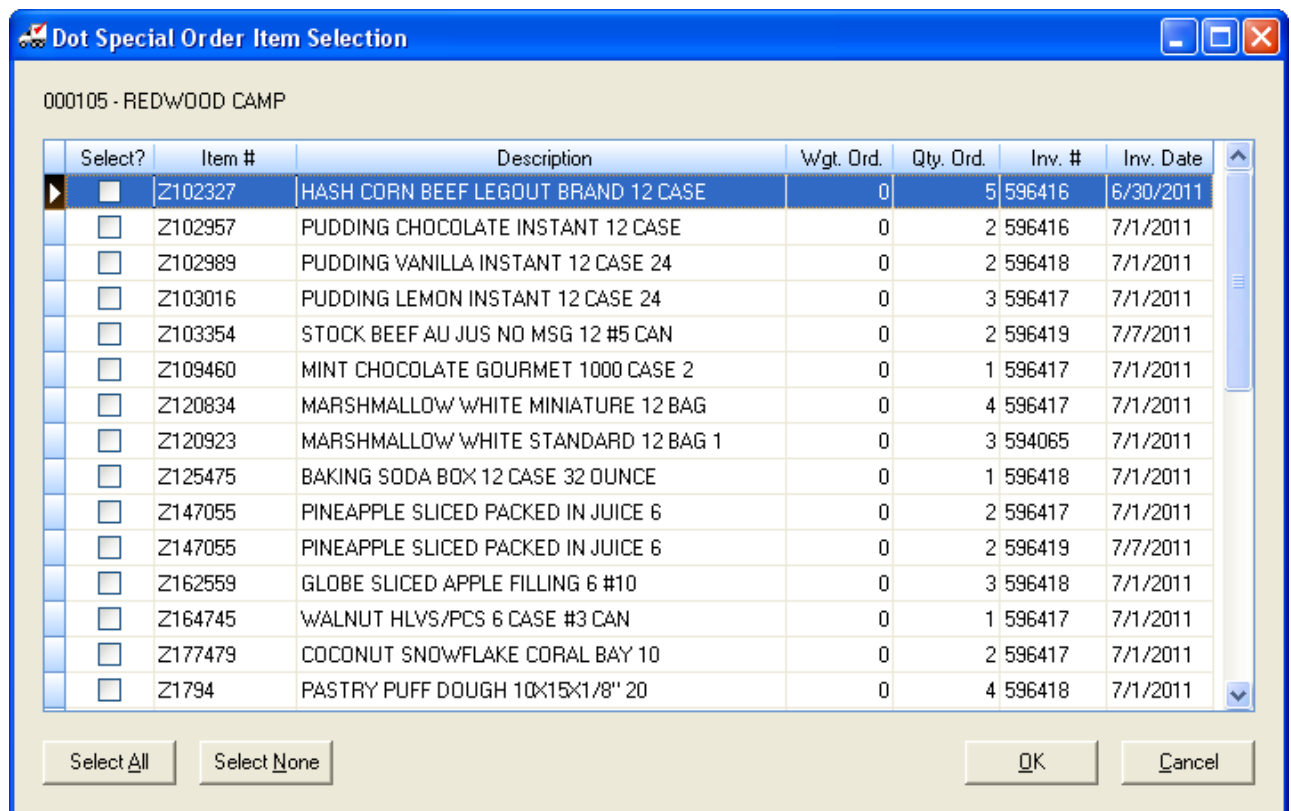
entrée V4 SQL

Go to the **Vendor** ribbon menu >
Purchase Order drop down menu to
access your PO options.



entrée V3 Use menu path: Select the
Purchasing menu.

- When creating a PO in **entrée** for a Dot Foods vendor, **entrée** will look for any special order items that have been pre-ordered. When first adding items to the PO if any are found, the Dot Pre-Orders dialog message will display "This vendor has open pre-order items available. Would you like to view them now?".
- Click the **Yes** button to open the **Dot Special Order Item Selection** dialog.



4. Each of the individual pre-order items will be listed in the dialog. The customer number and company name of the customer that pre-ordered the product will be displayed in the upper left corner of the dialog for the currently selected item.
 - Click on any of the column headings to sort the data by that column in **entrée V3**.
 - To add a pre-order item to the PO “check” the item in the **Select?** column.
 - All items may be “checked” at once by clicking the **Select All** button.
 - Click the **Select None** button and all items will become “unchecked”.
 - When the selected items are added to the PO, they will be summarized.
5. Once all of the items are selected to add to the PO click **OK** to return to the Create PO window.
6. Finish creating the PO and click **OK**.
7. When the Purchase Order is saved you will be prompted 4 times in the order listed below.
 - In the **Question** dialog box the message is "Would you like to attach any Supplemental P.O.s to this order?" Click **No**.
 - In the **Question** dialog box the message is "P.O. # has been successfully created. Would you like to print this purchase order?" Click **Yes** or **No** as required by your business procedures.
 - For Dot Foods Items the **Submit PO?** dialog box message is "**Would you like to submit the PO to Dot Foods via FTP at this time?**". Click **Yes** to proceed. Click **No** to perform the export manually later per the manual export instruction previously discussed in this chapter. See images below.
 - In the **Question** dialog box the message is "Would you like to receive the P.O.?" Click **Yes** or **No** as required by your business procedures.

entrée V4 SQL

The screenshot displays the 'Create Purchase Order' window. At the top, it shows the Vendor No. (DOT) and Purchase Order No. (37882). The Vendor information includes DOT FOODS, 14600 GATEWAY RD, CAMBRIDGE CITY, IN 47327. The Ship To address is Madison Distribution, 168 BOSTON POST RD, MADISON, CT 06443. Contact information for Brandi Lamb and Joe Smith is provided. The Terms are NET 30. A table of items is visible, with columns for Item #, Description, UOM, Qty Ordered, Unit Cost, and Extended Amt. A 'Submit PO?' dialog box is overlaid on the table, asking 'Would you like to submit this PO to Dot Foods via FTP at this time?' with 'Yes' and 'No' buttons. The bottom of the main dialog shows summary statistics: Vend #: , Total Units: 20.00, Last Purch.: , Total Weight: 120.16, On Hand: , Total Cubes: 15.96, On Order: , P.O. Total: 648.66, and Pack Size: .

entrée V3

Vendor No. DOT Purchase Order No. 75369 Required Date 07/26/11 P.O. Date 07/26/11

Vendor: DOT FOODS, INC DRY
1 DOT WAY
MT STERLING, IL 62353

Contact: DOT DRY Phone: (800) 366-3687

Terms: NET 10 DAYS

Submit PO?
Would you like to submit this PO to Dot Foods via FTP at this time?
Yes No

Item #	Description	UDM	Qty Ordered	Wgt Ordered	Unit Cost	Extended Amt
Z341761	BLUEBERRY WHOLE INDIVIDUAL QUICK	CASE	4	N/A	20.0000	80.0000
Z359491	MINI M&M BAKE BITS 25 POUND	CASE	1	N/A	83.3300	83.3300
Z423083	TWO BULB HEAT LAMP 1 COUNT	CASE	2	N/A	93.0000	186.0000
Z423510	SALAD SPINNER FIVE GALLON 1 COUNT	CASE	1	N/A	100.0000	100.0000
Z423806	SCONES BLUEBERRY FREEZER TO OVEN 96	CASE	2	N/A	57.6800	115.3600
Z426634	BLEACH ULTRA GERMICIDE CLOROX 6	CASE	2	N/A	10.5000	21.0000
Z452663	KRUSTEAZ COFFEE CAKE CINNAMON	CASE	3	N/A	62.6100	187.8300
Z535065	KETTLE BRAND TIASI ZESTY RANCH 24	CASE	1	N/A	16.0800	16.0800

Vend #: Last Purch.: On Hand: Pack Size: Total Units: 32.00 Total Weight: 568.60 Total Cubes: 39.45 P.O. Total: 1310.75

- If you choose **No** in the **Submit PO?** dialog, you will *not* export the PO to Dot Foods via FTP at this time. The export can be done later using the **Export** utility, from the Dot Foods Control Panel as discussed previously in this chapter.
- Once a purchase order has been submitted via FTP, you will not be allowed to change any items on the PO and subsequently re-submit the purchase order via FTP. All changes after the first submission to Dot Foods will have to be handled by a call to Dot Foods customer service.

P.O. Submitted

⚠ Purchase Order #75372 has already been submitted to Dot Foods via EDI.

Any changes made to this PO must be manually called into Dot Foods.

OK

- Click **OK** in the P.O. Submitted dialog.

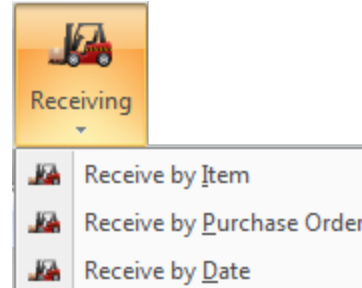
Receiving the PO

During the receiving process, you will have an opportunity to adjust quantities for special order items, should one or more items be short shipped.

- To access the **Receiving** features in **entrée**:

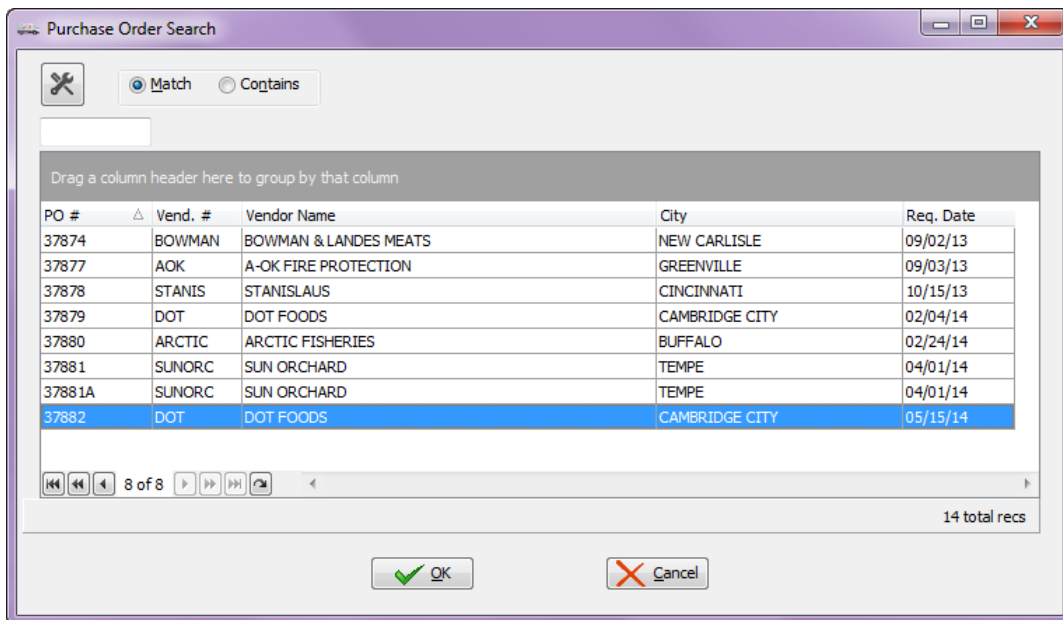
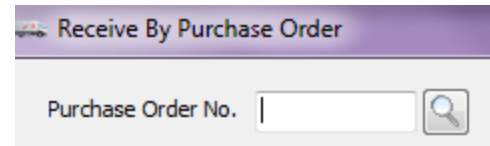
entrée V4 SQL

Go to the **Vendor** ribbon menu > **Receiving** drop down menu to access the options.



entrée V3 Use menu path: **Inventory** > select from the **Receiving** options.

- In the **Receive by Purchase Order** option click the search tool and the **Purchase Order Search** dialog will open

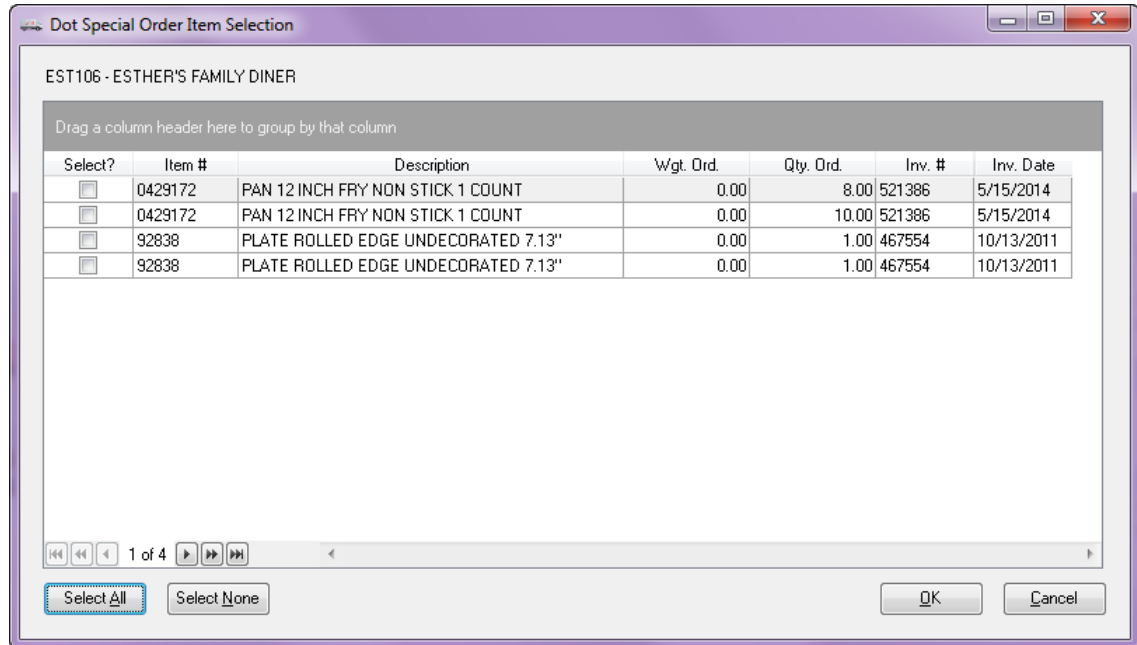


- Find and select the desired Dot Foods PO then click **OK**. The items from the PO will be listed in the Receive by Purchase Order item grid.
- entrée V4 SQL** Click the **Dot Items** button at the bottom of the window.

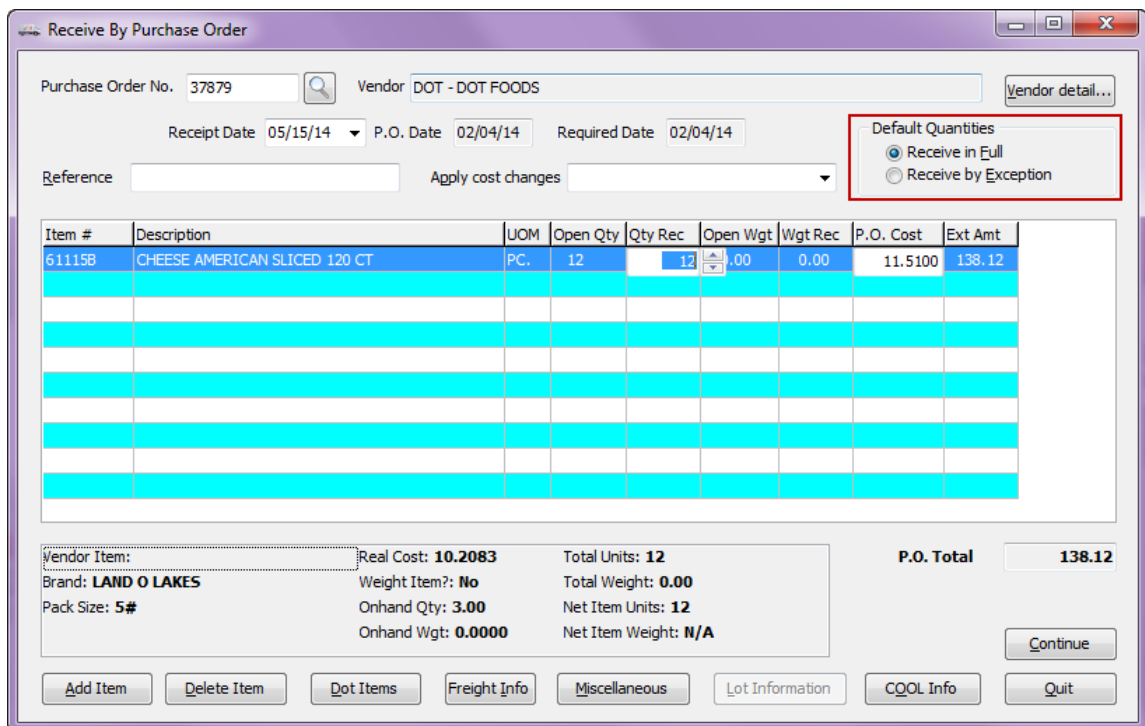
The **Dot Special Order Item Selection** dialog opens. Check the **Select?** column for the items to be received.

- All receipts for the special order items will be made here.
- All items may be “checked” at once by clicking the **Select All** button.
- Click the **Select None** button and all items will become “unchecked”.

- There will be one entry per invoice where the special order item was purchased. The customer number and name of the company that purchased the item will be located in the upper left corner of the dialog for the item currently selected in the grid.
- Use the **Drag a column header here to group by that column** feature to better organize items when the list is large.



5. The Receive By Purchase Order screen will open select your **Default Quantities** method: **Receive in Full** or **Receive by Exception**.

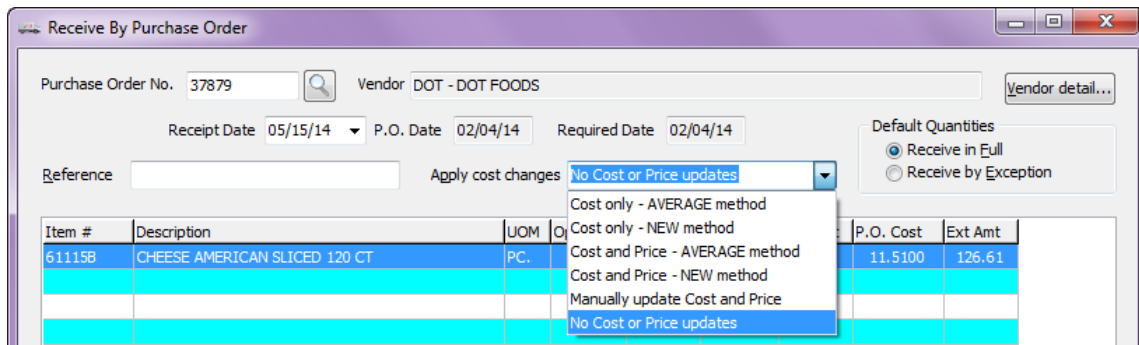


6. Select and double click the line item to make adjustments to the **Qty Rec** (quantity received) and **P.O. Cost** fields.

Using the Quit Button:

- Clicking the **Quit** button when a purchase order is already loaded, will prompt you to cancel the receipt of the current purchase order.
 - Then you will either click **Yes** to confirm the cancellation or the **No** button to proceed with the current purchase order.
 - Clicking the **Quit** button when a purchase order is *not loaded*, will close the receive by purchase order utility.
7. Make a selection from the **Apply cost changes** drop down menu that aligns with your business practices.

- **Cost only - AVERAGE method** - entrée will automatically calculate the value of the on hand quantity and the value of the amount being received and then change the costs based on the average of the two amounts. If an item has no on hand quantity, or is running in the negative, entrée will then change the costs based only on the amount being received (new cost).
- **Cost only - NEW method** - The new cost of the item will become the current real cost of the item, regardless of the cost of any remaining inventory.
- **Cost and Price - AVERAGE method** - entrée will automatically calculate the value of the on hand quantity and the value of the amount being received and then change the costs based on the average of the two amounts. If an item has no on hand quantity, or is running in the negative, entrée will then change the costs based only on the amount being received (new cost).
- **Cost and Price - NEW method** - The system automatically takes the new cost of the item and applies it as the cost both to the item amounts being received and to inventory presently in stock. Prices are then calculated off the newly adjusted costs. The new cost of the item will become the current real cost of the item, regardless of the cost of any remaining inventory.
- **Manually update Cost and Price** - When this method is selected, the Item Cost/Price Update dialog will be displayed for each and every item that has a cost change.
- **No Cost or Price updates** - No changes are made to costs or prices for any of the items received, even if costs changed. Costs and prices may be changed at a later time using the Cost/Price Update utility or the Quick Price Change utility.



8. Optionally use these buttons as needed to update the PO:

- **Add Item**
- **Delete Item**
- **Freight Info**
- **Miscellaneous**
- **Lot Information**
- **Cool Info**

9. Click the **Continue** button. Depending on the current **entrée** system settings, you may be prompted for one or more of the following...

- Close the purchase order after posting
- Edit supplemental purchase orders
- Post the purchase order to AP
- Print the PO Receiving Report
- Print DHEC Labels

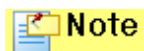
The screenshot shows the 'Receive By Purchase Order' window. At the top, the Purchase Order No. is 37879 and the Vendor is DOT - DOT FOODS. The Receipt Date is 05/15/14, P.O. Date is 02/04/14, and Required Date is 02/04/14. The Default Quantities are set to 'Receive in Full'. A table lists the items:

Item #	Description	UOM	Open Qty	Qty Rec	Open Wgt	Wgt Rec	P.O. Cost	Ext Amt
61115B	CHEESE AMERICAN SLICED 120 CT	PC.	12	11	0.00	0.00	11.5100	126.61

A 'Question' dialog box is displayed in the foreground, asking: 'One or more items have not been received in full. Should this P.O. be closed after posting?' with 'Yes' and 'No' buttons. At the bottom of the window, there are buttons for 'Add Item', 'Delete Item', 'Dot Items', 'Freight Info', 'Miscellaneous', 'Lot Information', 'COOL Info', and 'Quit'. The 'Continue' button is also visible.

10. Select **Yes** and close the purchase order. Once closed, the purchase order cannot be changed and can only be accessed by printing the purchase order.

- Purchase orders can be closed manually at any time by using the Close Purchase Order utility.



Note All purchase orders from the current period that have been closed are purged from the system, when the Close Period utility is executed.

Post to entrée.AP

When the [entrée.AP](#), the accounts payables add-on module, is installed and the user chooses to post the purchase order to AP, the AP Enter Payables window will be opened.

The vendor information for the purchase order will be automatically be loaded and the cursor will be placed in the Number field of the Payable section.

- For more detailed information about Purchase Order processing or AP Enter Payables please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

Chapter 7

Setup in entrée.NET

7 Setup in entrée.NET

entrée.NET Support for entrée.DOT Software

All items purchased from Dot Foods can flow into **entrée.NET** to provide you with even more selling opportunities. To support entrée.DOT "**Special Order**" and "**Drop Ship**" items *you must enable DOT* in **entrée.NET**.

1. Login to **entrée.NET** as the Administrator.
2. Go to the **Settings** tab > **Options** button > **Order Entry** section.
3. Select "**Yes**" for the "Show DOT" options you require for your business.

The screenshot shows the 'Settings' interface in entrée.NET. The 'Options' tab is selected, and the 'Order Entry' section is visible. A search bar is at the top. The 'Options' section contains a table with the following data:

Option Description	Current Setting
Restrict delivery dates to customer route information.	No
Show item description line 2.	No
Show item description line 3.	No
Show item description line 4.	No
"Standard Order" item grouping method	Class
Display min/max quantity warnings	Yes
Show "Case Count" in order entry.	Yes
Show DOT special order items.	Yes
Show DOT dropship items.	Yes

The last two rows are highlighted with a red border. Below the table is a 'Promotions' section.

- For more information about entrée.NET please visit the [entrée.NET KnowledgeBase](#).

Chapter 8

Using Management Sales Review

8 Using Management Sales Review

Management Sales Review Utility Overview

Once you have authorized users in **entrée** they can perform Management Sales Review functions. When you need to adjust the quantity of a special order item on an invoice after it is been purchased, you will use the Management Sales Review utility, which is accessible from the Dot Foods Control Panel.

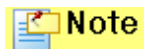
entrée V4 SQL Go to the **Add-Ons** ribbon menu > **entrée.DOT** drop down menu > select **Management Sales Review**.

entrée V3 Use menu path: **Inventory** > **entrée.DOT Control Panel** > select **Management Sales Review**.

Management Sales Review can be used to view pending sales and provides a historical view of the sales of your Dot Foods catalog items. Use it to easily observe which products are selling well and use this information to adjust the items you import from the Dot Foods catalog.

This utility allows *authorized* personnel to make changes to special order items on an invoice after it is been purchased. The authorization is given via the **entrée Security Manager** as described in the beginning of this chapter.

1. Edit invoices, sales orders, and/or purchase orders associated with the selected line item.
2. Print invoices, loading sheets, sales order confirmations, sales order loading sheets, sales order releases, and/or purchase orders associated with the selected line item.
3. Delete the selected item.
4. Undo changes to the selected item.
5. Properties, Filters and Columns similar to the Import Item Selection grid.



Note

Once an item has been delivered no additional changes are allowed.

Manager Items Grid Overview

Along the left side of the dialog is the items grid area, which contains all of the pre-order items from the Dot Foods catalog ordered on the current system date.

Clicking on any column heading will sort the items in the grid by the selected column, which is indicated by a light blue line above the column heading with an arrow point up or down, depending on if the sort is in ascending or descending order.

Depending on the state of the item, one or more fields in the grid may be editable. Editable fields will remain white, where as non-editable fields will be shaded.



Note

Once an item has been delivered it becomes part of the sales history data.

Item #	Description	Status	Dot Type	Price
D378202	MRS.FRIDAY'S ITALIAN CALAMARI	Purchased	Drop Ship	59
D378138	MRS.FRIDAY'S TAVERN BATTERED COD	Purchased	Drop Ship	59
A3603	SOUP CHEF FRANCISCO CHICKEN GUMBO 4	Received	Special Order	59
A396274	BULK PAK COCOA PUFFS CEREAL 4 CASE	Received	Special Order	59
A3578	SOUP CHEF FRANCISCO TOMATO	Delivered	Special Order	59
A3418	SOUP CHEF FRANCISCO BOSTON CLAM	Delivered	Special Order	59
A361740	MIX CORN DOG 50 POUND	Received	Special Order	59
A3603	SOUP CHEF FRANCISCO CHICKEN GUMBO 4	Received	Special Order	59
A3418	SOUP CHEF FRANCISCO BOSTON CLAM	Received	Special Order	59
A3418	SOUP CHEF FRANCISCO BOSTON CLAM	Received	Special Order	59
A396111	GOLD MEDAL VANILLA CREME READY TO	Received	Special Order	59
A3578	SOUP CHEF FRANCISCO TOMATO	Received	Special Order	59
A359844	BREAD PROGRESSO CRUMBS PLAIN 25	Received	Special Order	59
A3578	SOUP CHEF FRANCISCO TOMATO	Purchased	Special Order	59
A3610	SOUP CHEF FRANCISCO VEGETABLE BEEF	Purchased	Special Order	59
A3578	SOUP CHEF FRANCISCO TOMATO	Purchased	Special Order	59
A3464	SOUP CREAM OF ASPARAGUS SPEAR 4	Purchased	Special Order	59
A3418	SOUP CHEF FRANCISCO BOSTON CLAM	Purchased	Special Order	59
A3418	SOUP CHEF FRANCISCO BOSTON CLAM	Purchased	Special Order	59
A3642	SOUP CHEF FRANCISCO FRENCH ONION 4	Purchased	Special Order	59
A3610	SOUP CHEF FRANCISCO VEGETABLE BEEF	Purchased	Special Order	59
A3578	SOUP CHEF FRANCISCO TOMATO	Purchased	Special Order	59
A361740	MIX CORN DOG 50 POUND	Purchased	Special Order	59
A336706	SHELL PANCHO VILLA JUMBO TACO 200	Purchased	Special Order	59

Line Item Details

Item Information

Item # A3418
 Description SOUP CHEF FRA...
 Dot Item # 3418
 Dot Type Special Order
 Status Received

Invoice Information

Invoice Number 596441
 Invoice Date 07/07/11
 Bill To Customer 000436
 Bill To Company STRAWBERRY J...
 Ship To Customer 000436
 Ship To Company STRAWBERRY J...
 Qty Ordered 2
 Wgt Ordered 0.0000
 Unit Price 60.0000
 Deposit Amount 60.00
 Delivery Invoice
 Delivery Date
 Qty Shipped 0
 Wgt Shipped 0.0000
 Delivery Amount 0.00

Purchasing Information

PO Number 75372
 PO Date 07/05/11
 Qty Purchased 2

Properties Filters Columns

Buttons:

- **Home** button will return you to the Dot Control Panel **without** posting any changes.
- **Post** button you will be able to click this button once one or more items have been modified to update the affected invoices and/or purchase orders.

Line Item Details Area Overview

Along the right edge of the dialog is the Line Item Details area. This area contains controls for filtering and searching the pre-order items from the Dot Catalog, configuring the columns that are displayed in the items grid and additional information about an item that is may not be currently displayed in the grid.

This panel can be collapsed by clicking the double >> symbol in the top right corner of the form, making room for more columns of data in the items grid. Once collapsed, clicking the << icon will cause the Line Item Details area to be expanded back into view.

At the bottom of the Line Item Details area are three buttons: **Properties**, **Filters** and **Columns**. Detailed explanations about the use of these buttons follow.



Clicking the **Properties** button at the bottom of the Line Item Details area will display information about the currently selected preorder item in the grid that pertains to the sale, purchase, receipt and delivery of the item.

By default data is broken out into categories, such as Item Information, Invoice Information, and Purchasing Information. Categories will be displayed in **bold** text with a blue gradient background and have a – or + button to the left of the category title text. These buttons will collapse that category to make room for additional data to be displayed or expand the category so the sub-properties become visible.

Directly above the properties grid on the left, there are two buttons used for altering how the data is displayed in the properties grid, **Alphabetic** and **Category**.



View the information in “**A**” alphabetic order. This button will remove all of the category headings, and sort the properties into a single list, sorted alphabetically.



Clicking the **Category** button with the tree nodes icon will put the properties grid back into a category based list.

Item Information	
Item #	A3418
Description	SOUP CHEF FRA...
Dot Item #	3418
Dot Type	Special Order
Status	Received
Invoice Information	
Invoice Number	596441
Invoice Date	07/07/11
Bill To Customer	000436
Bill To Company	STRAWBERRY J...
Ship To Customer	000436
Ship To Company	STRAWBERRY J...
Qty Ordered	2
Wgt Ordered	0.0000
Unit Price	60.0000
Deposit Amount	60.00
Delivery Invoice	
Delivery Date	
Qty Shipped	0
Wgt Shipped	0.0000
Delivery Amount	0.00
Purchasing Information	
PO Number	75372
PO Date	07/05/11
Qty Purchased	2

Along the right top of the properties grid, there are 4 additional buttons



Edit Documents

Clicking this button will open a context menu allowing you to edit the invoice, sales order, and/or purchase order that is associated with the selected line item in the items grid.



Print Documents

Clicking this button will open a context menu allowing you to print the invoice, loading sheet, sales order confirmation, sales order loading sheet, sales order release, and/or purchase order that is associated with the currently selected line item in the items grid.



Undo Changes

Clicking this button will open a dialog asking confirmation to restore the currently selected line item in the items grid to its original state before changes were made. If there are no pending changes to the currently selected item in the grid this button will be disabled.



Delete Item

Clicking this button will open a dialog asking you to confirm the deletion of the currently selected line item in the items grid.

Once deletion is confirmed, the item will remain in the line items detail grid until the **Post** button is clicked, but the row in the grid will be highlighted in red with a strike through line through the text.

You will still be able to abort the deletion, by highlighting the deleted item in the grid and clicking the **Undo Changes** button.

Dot Foods Control Panel - [Management Sales Review]

Home Post

Status	Dot Type	Invoice #	Inv. Date	Ship To	Order Qty.	Unit Price
chased	Special Order	596416	06/23/11	000222	2	60.0000
chased	Special Order	596428	06/29/11	000486	2	61.5546
chased	Special Order	596428	06/29/11	000486	4	50.1724
chased	Special Order	596436	06/30/11	000453	3	62.2070
chased	Special Order	596436	06/30/11	000453	1	22.6373
chased	Special Order	596436	06/30/11	000453	1	43.7922



Note

Once an item has been delivered no additional changes are allowed.

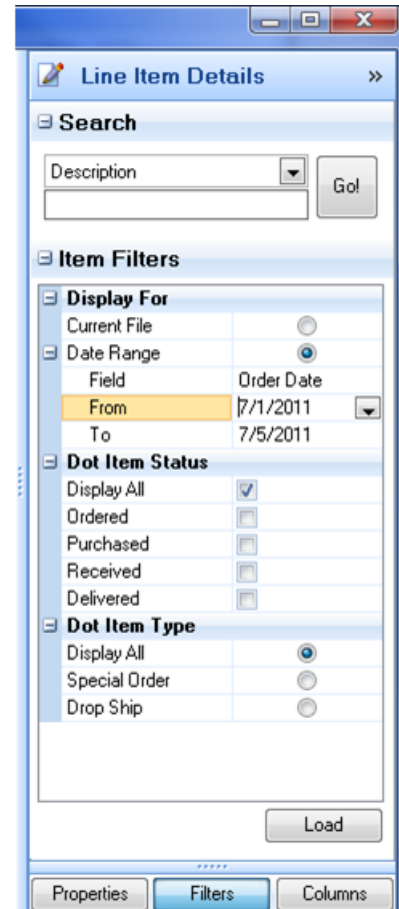


Clicking the **Filters** button at the bottom of the Line Items Detail panel will expose a means to filter or change the items that are displayed in the items grid. After clicking the **Filters** button, two sub groups will be displayed in the Line Items Detail area.

Search

The most basic method of filtering is a simple search which can be performed in the first group entitled "Search". This will default to Description, but there are many other columns that may be searched which can be accessed by selecting the desired column to search from the drop down control. Beneath the drop down control is where you will enter the word or phrase to search for.

- Click the **Go** button and the item grid will only display the pre-order items in the item grid that meet the search criteria. The search is performed using a "contains" method on the selected column so the search expression can exist anywhere in the column searched.
- To clear an existing search, simply delete the text in the search text box and click the **Go** button again.



Item Filters

The items that are loaded in the grid are determined by item filter values defined in this section. The Display for sub-group allows you to display all items in current files or a subset of items by date range.

When using the date range option, you will be allowed to specify which field, Invoice Date, Purchase Date, or Delivery Date that should be validated against.

You may also filter by Dot Item Status, which allows for one or more of the "ordered", "purchased", "received", or "delivered" options to be selected. This field defaults to "Display All".

Finally the you may also filter what type of pre-orders should be displayed in the Dot Item Type subgroup. Available options include Special Order, Drop Ship, or to Display All.

To apply one or more of these filers, expand the title of the filter and check the values you wish to see displayed. Once the filter conditions are set, click the **Load** button to update the item grid.

Clicking the **Load** button will remove all existing search conditions.



Clicking the **Columns** button in the Line Item Details panel, will invoke the Manager Items Grid layout configuration panel.

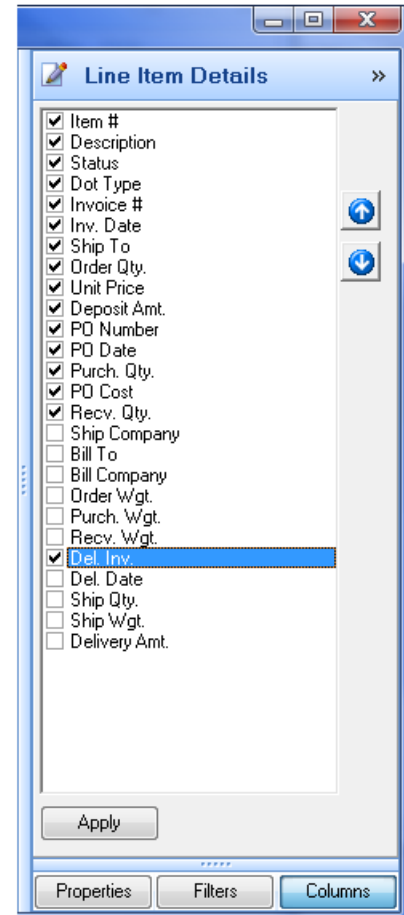
Each of the available columns that can be displayed in the Items Grid is listed. Columns that are checked will become visible in the grid and unchecked columns will be hidden.

Columns will be displayed left to right in the grid, starting with the first checked column in the list.

Columns may be moved within the list by using the Up and Down arrow buttons on the Columns Layout editor or using a Drag and Drop method. Using the keyboard, the currently selected column can be moved using the Ctrl-Up or Ctrl-Down keyboard shortcuts.

When the column order is set, click the **Apply** button to update the Items Grid. The displayed column in the list will also be re-sequenced so that all of the “checked” columns will be displayed at the top of the list.

The column configuration is bound to the **entrée** user account and automatically saved when the **Apply** button is clicked, meaning **entrée** will remember your desired column layout the next time items are viewed in the Management Sales Review utility.



Chapter 9

Supporting Features in entrée

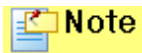
9 Supporting Features in entrée

In addition to the areas that need to be setup for **entrée.DOT** there are areas in the main **entrée** system that have been enhanced to support the use of Dot Foods catalog items. Click on the links to review these topics:

- [Close Period](#)
 - [Inventory File Maintenance](#)
 - [Invoicing](#)
 - [Manufacturer File Maintenance](#)
 - [Purchase Orders](#)
 - [Receiving](#)
- For more detailed information about the features listed here please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

9.1 Inventory File Maintenance

A **.DOT** tab has been added to Inventory File Maintenance for Dot Foods catalog items. This tab will display key information from the Dot Foods item catalog.



Note The **.DOT** tab will **only** be displayed for items that are Dot Foods catalog items.

entrée V4 SQL

The screenshot shows the 'Inventory File Maintenance' window with the following details:

- Item Number:** 06103
- Description:** APTZR ONION RING BTRD BEER THIN 3/8
- Brand:** BREW CITY
- Class:** APPETIZER
- UPC Code:** 007271410010
- Pack Size:** 6/2.5#
- Temp Zone:** Frozen
- Unit of Measure:** CASE
- Warehouse Loc.:** FD2F
- Misc. Codes:** F
- Cubic Feet:** 1.30
- Gallons:** 0.000
- Options:** Track By Lot, Stock Item, Inactive, Allow Oversell, Taxable,

The **.DOT** tab is active, displaying a table of properties:

Property	Special Order	Value
Boxes/Layer	Drop Ship	10
Buying Group		INDEPENDENT FOODSERVICE
Case UPC		007271410010
Dot Category		BREW CITY APPET COSTING
Crush Code		11 -MOST CRUSHABLE
Cubes		1.30 Cubic Feet
Description		MCN ONR- BCI BBAT TNCT 3/8" 6-2.5 LB
Discount Days		10
Discount %		0.02
Division		0
Dot Item #		406103
Factor		0.00
Gross Weight		17.00 Pounds
Handling Code		FRZ

At the bottom of the window, there are navigation buttons: 'Add Item', 'Copy Item', 'Delete Item', 'OK', 'Cancel', and 'Apply'.

entrée V3

entrée will determine if an item in the inventory file is a “Dot Foods” catalog item by first determining if one or more of the vendors for the item (vendor tab) are flagged as a “Dot Vendor”. The system will then cross compare the assigned vendor item number to the item numbers in the Dot Food catalog file. If a match is found, the item is deemed to be a Dot Foods item. This methodology allows for all the existing items that are purchased from Dot Foods to be automatically linked with the operator having to perform any additional tasks.

Key values, such as UPC Code, Cubes, Pallet Information, Gross Weight and Manufacturer Item # will automatically be updated from the Dot Foods catalog when viewing Dot Foods items in Inventory File Maintenance.

Overview of Inventory File entrée.DOT Information

• Dot Item Type

This field allows you to change how the item is sold in **entrée**. Available choices are Special Order, Drop Ship and Normal.

- This value can only be changed if there are no sales of the item in the current period.
- Items that are defined as Special Order or Drop Ship are forced to be a “non stock item” (the Stock Item field on the Inventory tab will be unchecked and disabled)
- Items that are defined as Special Order or Drop Ship will *not* be able to be tracked by lot. (the Track by Lot field on the Inventory tab will be unchecked and disabled).

• Lead Time

This field allows the default lead time for the Dot Foods special order or drop ship item to be overridden on a per item basis. This field is not enabled for “Normal” Dot Foods catalog items.

- **Selling UOM**

This field is used to assist in the purchasing process for “normal” Dot Foods catalog items. For most items it is fine to leave this field set to the default value ‘CASE’. However if you do not sell the item in the same manner that it is purchased from Dot Foods you will want to adjust this field to how you sell the item. Available choices are as follows:

- **CASE:** The item is sold the same way that it is purchased.
- **PC:** The item is purchased by the case, but only sold as individual pieces.
- **LB:** The item is purchased by the case, but sold by the pound.

- **Include in Export to entrée.DSR**



This field is used to override whether or not this item should be included when exporting inventory data to **entrée.DSR**. This option is only enabled for Dot Foods catalog items that are defined as Special Order or Drop Ship.

Adding Manufacturer Information to Items in the Inventory File

With the goal of tracking sales information by manufacturer the Manufacturer ID and Manufacturer Item Number fields have been added to the **Vendor Tab** in Inventory File Maintenance. When purchasing from a master distributor such as Dot Foods, sorting by “Brand Name” does not work because many manufacturers produce products under a variety of Brand Names. Reports in the **entrée** system have been updated to support the Manufacturer feature.


- **First use the new [Manufacturer File Maintenance](#) feature to add the product manufacturer's information to the item in entrée.**


entrée V4 SQL

1. Go to the **Inventory** ribbon menu and select the **Inventory** option.
2. In the **Item Number** field search  for the manufacturer's item in the Inventory File.
3. When the item is found click the **Vendor** tab.
4. Go to the **Manufacturer ID** field at the bottom of the screen.
5. Use the magnifying glass search tool  to find the **Manufacturer ID**.
6. Then enter the **Manufacturer Item Number** for the item.
7. Click the **Apply** button to add the manufacturer's information to the item. An image is displayed below.

Vendor Information

Vendor #	Vendor Name	Vendor Item Number	Seq #	Last Cost	Last Purchase
*DOT	DOT FOODS	406103	300	35.1200	12/06/12
USFS	US FOOD SERVICE/ CINCINAATI		0	37.7400	03/26/12
USFOOD	US FOOD / MONDAY PICK UP		0	37.3800	08/28/12

Primary Vendor: DOT 

Manufacturer ID: BREW BREW CITY  Manufacturer Item Number: 70010010

entrée V3

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



2. In the **Item Number** field search for the manufacturer's item in the Inventory File.

3. When the item is found, click the **Vendor** tab.

The screenshot shows the 'Inventory File Maintenance' window with the 'Vendor' tab selected. The 'Item Number' is 10500 and the 'Description' is BROCCOLI SPEARS. The 'Vendor' tab shows a list of vendors with columns for Vendor #, Vendor Name, Vendor Item Number, Seq #, Last Cost, and Last Purchase. The vendor 'DOT FOODS' is highlighted in red. Below the list, the 'Primary Vendor' is set to DOT10. At the bottom, the 'Manufacturer ID' is GGT10 (Green Giant) and the 'Manufacturer Item Number' is BS0100. The 'Apply' button is highlighted in red.

Vendor #	Vendor Name	Vendor Item Number	Seq #	Last Cost	Last Purchase
GF10	GUNTER FARMS, INC.	BS9000	0	14.6111	02/05/01
HBI10	HENRY BROTHERS, INC.	127458	2	0.0000	
MFS10	MIDLAND FOOD SERVICES, INC.	5247	0	0.0000	
* DOT10	DOT FOODS	BS1000	0	14.2000	

4. Go to the **Manufacturer ID** field at the bottom of the screen.




5. Use the magnifying glass search tool to find the **Manufacturer ID**.

6. Then enter the **Manufacturer Item Number** for the item.

7. Click the **Apply** button to add the manufacturer's information to the item. See the example above.

• Second, Assign a Primary Vendor to the Inventory Item

Any vendor listed in the vendor grid may be designated as the primary vendor by entering the

vendor number in the **Primary Vendor** field or use the magnifying glass search  tool to find the specific vendor in the Vendor File. Use the same process for both **entrée V4 SQL** and **entrée V3**.

- Click the **Add** button to add the primary vendor.
- Use the **Delete** button to remove a primary vendor.

"Dot Foods" will be defined as a vendor for that item in the **Vendor** tab of the Inventory File, along with the Dot Foods Item Number (Vendor Item Number) as seen in the image at the beginning of this section.

Once you add the information for the “Primary Vendor” field you can add an unlimited number of secondary vendors.

**Note**

This is how the system will determine matching records between your Inventory File and the Dot Foods item file.

- For more detailed information about Inventory File Maintenance please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

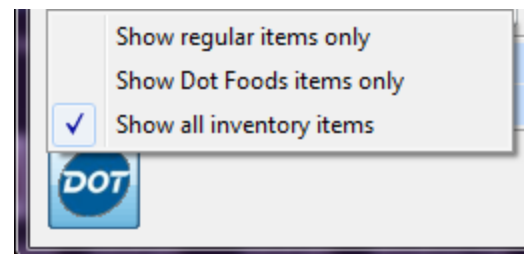
entrée Inventory Search Enhancements

Once the **Display in Inventory Search Screens** option is enabled in the System Preferences **entrée.DOT** tab, special order and drop ship items will be displayed in **entrée** Inventory Search screens.

entrée V4 SQL

In the lower left corner of the Inventory Search screen click the **DOT** button to access a menu of viewing options.

Choose whether you want to view the Dot Foods catalog items in your search.



Using the **DOT** button feature can help you keep your regular day to day catalog items from being overshadowed by the numerous items from Dot Foods.

Colors

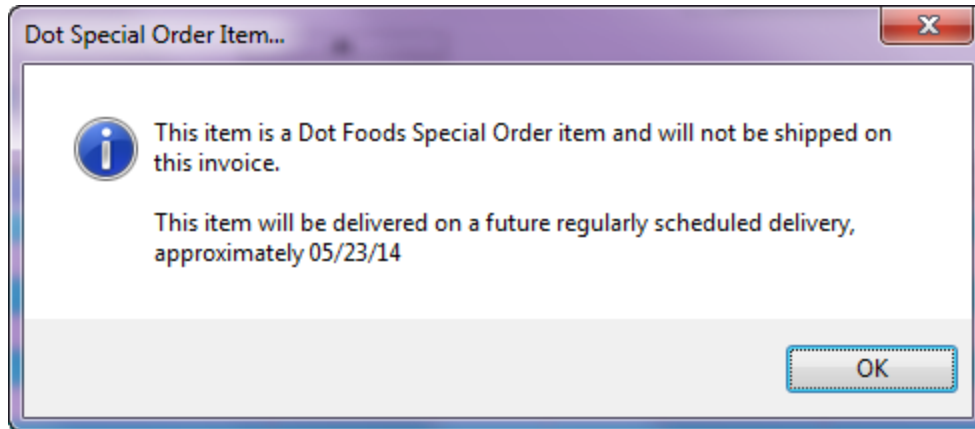
Each of the Dot Foods items can be configured to use a different highlight color in the inventory search system so they stand out for your DSRs. The **Dot Item Type** is indicated by the color. These colors can be customized for your business using the **Tools** button. See the [entrée.DOT tab](#) topics in this guide for more information on how to change colors in V3 & V4 SQL.

If the default is *not* enabled then special order and drop ship items can only be accessed through a special function key. Using this approach can help you keep your regular day to day catalog items from being overshadowed by the numerous items from Dot Foods.

- Go to the Using the V4 Search Screens chapter in the [entrée V4 SQL KnowledgeBase](#) for more information about the great new features for searching in entrée V4 SQL.

9.2 Invoicing

This section will detail how **Special Order** and **Drop Ship** items (that have been imported into the **entrée** inventory file) from the Dot Foods catalog are sold and shipped. The processed outlined in this section applies to both invoices and sales orders. For the purposes of simplicity the term invoice and sales order can be interchanged throughout this section unless otherwise noted.



- When a **Special Order** Dot catalog item is added to an invoice, **entrée** will calculate when the product should be received by the distributor based on the lead time assigned to the item. If the current system date plus the lead time days is greater than the invoice date, the operator will be prompted that the item is a special order item and will be delivered on a future invoice. An approximate delivery date is displayed in the message dialog using a formula that considers the items lead time and the routing information defined in customer file maintenance. The date displayed should be the customers next scheduled delivery date after the product is received from Dot Foods.



- When a **Drop Ship** Dot catalog item is added to an invoice, the operator will be prompted that the item is a drop ship item and will be delivered on a future date directly from Dot Foods. An approximate delivery date is displayed in the message dialog using a formula that considers the items lead time from the current system date.
- When Dot special order or drop ship items are first added to the invoice, the Ship Qty and Ship Wgt values will be displayed as "**Preorder**". In the Extended Amount for the line item there will be the deposit monies that should be collected followed by a **(dp)** to indicate to the operator that it is a deposit.

entrée V4 SQL

In **entrée V4 SQL** because of the new screen size you will have to scroll right to see the full Extended Amount column with (dp).

Rev	OT	Item #	UOM	Brand Name	Description	Pack Size	Order Qty	Ship Qty	Ship Wgt	Unit Price	Extended Amt
A	SA	0429172	EACH	VOLLRATH	PAN 12 INCH FRY NON STICK 1 COUNT	1/1 CNT	10	Preorder	Preorder	34.0800	170.40 (dp)
		51624	CASE	LABREA BAKERY F	BUN BRIOCHE 2.4 OZ OUNCE 72 COUNT	1/72 CNT	3	Preorder	Preorder	57.4100	86.11 (dp)

Line:	2 of 2	On Order:	0.0000	Dot Lead Time:	6 days
Seq. #:		OH Quantity:	Item Profit: \$0.00/0.00%	Item Whse Loc:	
Brand:	LABREA BAKERY F	OH Weight:	Level 1:	Unit Profit:	\$0.00/0.00%
Pack:	1/72 CNT	Last Sale:	N/A	Last Sale 1:	N/A
Pieces per Case:		Last Qty:	0.00	Last Price 1:	N/A
	NON-STOCK	Last Price:	0.0000	Dot Item Type:	Special Order
				Item Profit % 1:	N/A

entrée V3

Item #	UOM	Description	Order Qty	Ship Qty	Ship Wgt	Unit Price	Extended Amt
Z102327	CASE	HASH CORN BEEF LEGOUT BRAND 12 CASE	5	Preorder	Preorder	110.5797	276.45 (dp)
Z344806	CASE	RICE PARBOILED 25 POUND	3	Preorder	Preorder	18.6482	27.97 (dp)
Z352341	CASE	CHICKEN HOMESTYLE BREAST PATTIES	6	Preorder	Preorder	32.4292	97.29 (dp)
108024	CASE	BAGEL** PLAIN PAR BAKED 8024	4	4	0.0000	27.3719	109.49
Z359491	CASE	MINI M&M BAKE BITS 25 POUND	1	Preorder	Preorder	114.0704	57.04 (dp)
40060	CASE	AMERICAN CHEESE LOAF-6/5 lb	3	3	90.0000	2.8638	257.74
00010	CASE	EGGS EXTRA LARGE AA LOOSE 15DZ	2	2	30.0000	1.5600	46.80
Z102957	CASE	PUDDING CHOCOLATE INSTANT 12 CASE	2	Preorder	Preorder	62.9283	62.93 (dp)

Last Sale:	N/A	On Hand:	Weight:	On Order:	Dot Lead Time:	8 days
Last Price:	0.0000	Pack:	2/5.96 LB	Seq. #:	Min Price:	27.7173
Last Qty:	0.00	Brand:	TYSON POULTRY	Line:	Unit Profit:	\$ 0.00/ 0.00%

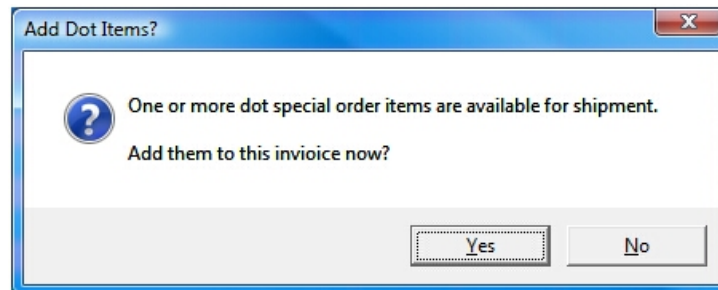
Monday	Total Cases:	9	Total Profit:	\$61.48/14.85%	Tax Total:	0.00	Invoice Total:	\$ 935.71
Invoice	Total Weight:	203.84	Promo Total:	0.00	Over Credit Lim:	935.71		
	Total Cubes:	6						

In **System Preferences** on the **System Options Tab** in the **Additional Features** drop down menu **Invoice Information Panel Configuration** option you can add Dot Lead Time and Dot Item Type information to the invoice information panel.

- See the [Invoice Information Panel Configuration](#) section of this guide for more details about updating in entrée V4 SQL and entrée V3.

Shipping Pre-ordered Items

Once the pre-ordered product has been purchased and received from Dot Foods (special order items only), you will be prompted by the Add Dot Items? dialog box in Create or Change Invoice when adding items for a customer that pre-ordered product. Click the **Yes** button to add those items to the invoice automatically.



When the invoice is printed, the original deposit amount that was charged will be deducted from the extended amount. Gross profit, discounts and other service charges are never applied to the deposit amounts. They are only calculated or applied when the special order or drop ship product actually ships.

Customer No.	Salesperson	Route/Stop	Order Date	Delivery Date	Terms	Invoice No.		
000478	25		07/05/11	07/05/11	CC/CASH/CHECK	596442		
LINE	ITEM NUMBER	QTY. ORDER	QTY. SHIP	UOM	DESCRIPTION	BILLIN UNITS	UNIT PRICE	EXTEND AMOUNT
					** FROZEN ITEMS **			
1	A3418	1	1	CASE	___SOUP CHEF FRANCISCO BOSTON CLAM CHOWDER 4 CASE 4 POUND	1	60.0000	60.00
					Less deposit amount from Invoice #596439			-30.00
2	A3578	1	1	CASE	___SOUP CHEF FRANCISCO TOMATO FLORENTINE 4 CASE4 POUND	1	48.5138	48.51
					Less deposit amount from Invoice #596439			-24.26
					** REFRIGERATED ITEMS **			
3	00386	5	5	CASE	___BUTTER WHIPPED 2/5#	50.00	3.0624	153.12
4	60045	3	3	CASE	___CREAMER NON-DAIRY COFFEE 1QT	36.00	16.2994	586.78
					*** Payment Due by 07/06/11 ***			
					These are your outstanding invoices:			
					Inv. Date Invoice # Amount Due			

					07/01/11 596439 310.26			

					Total balance due: 310.26			
					Number of PCS. 10 Total WEIGHT 120.00 INVOICE TOTAL(\$)			794.15
					-----			-----
					Customer's Signature: _____			

- For more detailed information about Invoicing please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

9.3 Purchase Orders & Dot Foods

Purchasing Enhancements

Once your purchase orders are created, **entrée** can automatically submit the PO to Dot Foods in EDI format providing you with a simple and easy one click ordering / acknowledgment system.

- Your buyers can manually create a purchase order for Dot Foods. When they are finished, they will be prompted to submit the PO to Dot Foods using the EDI system. In one step, Dot Foods will immediately have your order, and you will receive an acknowledgment in return.
- The automatic purchase order generation system within **entrée** will collect all items that need to be ordered from Dot Foods for a given date range. This will include special orders of non-stock items from open customer invoices. Besides open customer invoices, this procedure can look at other data such as below minimum stock level, etc. to create suggested purchase quantities. **entrée** will automatically create a purchase order from this data which you can review and edit before your EDI submission to Dot Foods.
- Any invoices that have drop ship items on them will have a single purchase order created for each customer with the proper delivery address.

If you would like to manually create a PO in **entrée** find the desired Dot Foods vendor in Create Purchase Order. Then the Dot Pre-Order message box will display if there are open pre-order items. See the [Build & Export Purchase Orders](#) section for more information.

- For more detailed information about Purchasing please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

9.4 Receiving & Dot Foods

Receiving Enhancements

- Optionally import the EDI Advanced Shipment Notice from Dot Foods. This document will contain all of the items that will be shipped on your upcoming delivery, broken down by pallet.

Dot Foods Advanced Shipment Notices

- The Advanced Shipment Notice data can then be used to generate a Dot Foods Receiving Sheet Report, containing each items warehouse location to assist in the receiving process.
 - Advanced Shipment data can also be used to print receiving labels for your Dot Foods delivery. Any special order items can include the customer and invoice information for the customer that purchased the item.
- For more information about Receiving please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

9.5 Manufacturer File Maintenance

The **entrée** Manufacturer File Maintenance subsystem allows you to define Item Manufacturers which can then be assigned to individual inventory items. The addition of this feature recognizes the fact that the vendor from whom you purchase a particular product may only be a reseller and not the original manufacturer of the product.

Add a Manufacturer to entrée entrée V4 SQL

1. Go to the **Inventory** ribbon menu and click the **Manufacturer** option.
2. Perform steps 2 - 6 in the **entrée V3** instructions that follow.

The screenshot shows the 'Manufacturer File Maintenance' window with the following data:

- Manufacturer ID: BOSCO
- Company: BOSCO
- Phone: (800) 438-2672
- FAX: () -
- Address 1: 441 Main Road
- Address 2:
- City: Towaco
- State: NJ
- ZIP: 07082-1298
- Contact:
- Email: sales@boscoworld.com
- Website: http://www.boscoworld.com/
- GS1 Id:

The BOSCO logo is displayed on the right side of the form. At the bottom, there are navigation buttons: 'New', 'Delete', 'OK', 'Cancel', and 'Apply'. A status bar at the bottom left shows '1 of 41' records.

entrée V3

1. Use menu path: **File > Manufacturer Maintenance**.

The screenshot shows the 'Manufacturer File Maintenance' window with the following data:

- Manufacturer ID:
- Company:
- Phone: () -
- FAX: () -
- Address 1:
- Address 2:
- City:
- State:
- ZIP:
- Contact:
- Email:
- Website:

A red box highlights the text 'Click to define Manufacturer Image' on the right side of the form. At the bottom, there are navigation buttons: 'New', 'Delete', 'OK', 'Cancel', and 'Apply'. A status bar at the bottom left shows '0 records'.

2. Click the **New** button.

3. Enter a unique value for the **Manufacturer ID**.

4. Then enter the following information:

- **Company** - the name of the manufacturer's company
- **Phone** - manufacturer's phone
- **Fax** - manufacturer's fax number
- **Address 1**
- **Address 2**
- **City**
- **State**
- **Zip**
- **Contact** - your contact at the manufacturer
- **Email** - contact email address
- **Website** - manufacturer's website URL

5. Use the “**Click to define Manufacturer Image**” to import an image from your computer to represent the manufacturer.

**Note**

Manufacturer's logos can be found and downloaded from many manufacturer's websites.

6. Click **Apply** then **OK** to save the new manufacturer record.

- For more information about the image selection and import process or **Manufacturer File Maintenance** features please refer to the topic in either the [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

9.6 Close Period

Dot Foods historical pre-order data will be archived as a part of the Close Accounts Receivable process in the Close Period utility.

- For more detail information about the requirements that need to be met before proceeding with the Closing process visit [entrée V3 KnowledgeBase](#) or the [entrée V4 SQL KnowledgeBase](#) in our website.

⚠ Caution Before closing make sure all data files are backed-up and all key financial reports have been run prior to using this utility.

entrée V4 SQL

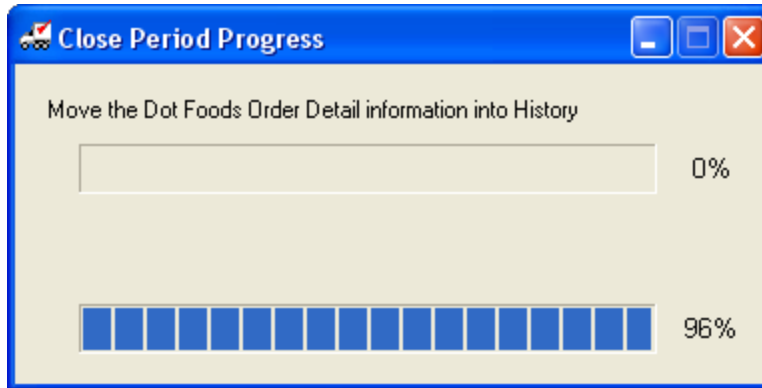
1. Go to the **System** ribbon menu and click the **Close Period** option.
2. The Close Period utility will open. Now follows steps 2 - 5 in the **entrée V3** instructions that follow.

entrée V3

1. Use menu path: **System > Closing > Close Period**.
2. Select the **Period Ending Date** using the arrow for the drop down menu.
3. Then check the box for **Close Accounts Receivable**.

The screenshot shows the 'Close Period' utility window. At the top, the 'Period Ending Date' is set to '05/31/11'. The 'Close Accounts Receivable' section is checked, with 'Date of last closing' at '03/31/11' and 'Period to be closed' at '05/2011'. Other options include 'Compute Finance Charges' (unchecked), 'Purge Zero Lots' (checked), and 'Retain lots empty less than' set to '0' days before '05/31/11'. The 'Close Accounts Payable' section is unchecked. The 'Close General Ledger - Period 07' section is also unchecked. A 'Confirm' dialog box is overlaid in the center, asking 'Ready to close period. Do you wish to proceed?' with 'Yes' and 'No' buttons. At the bottom of the window, a red warning message reads: 'Make Sure All Data Is Backed-Up and All Key Financial Reports Been Run Prior to Running this Utility'. 'OK' and 'Cancel' buttons are at the bottom right.

4. The Close Period Progress box will display a message about Dot Foods Order Details being moved into History along with all the other messages you will see in the progress box as the utility runs.



5. To view the historical data after the closing process is complete run the **Sales Report**.

Chapter 10

Electronic Order Pad

10 Electronic Order Pad

The [Electronic Order Pad](#) application for the iPad and Android tablets was created to take the place of [entrée.DSR](#).

The **Electronic Order Pad** was created primarily as an order entry tool for your DSRs. It was designed to create customer orders quickly while providing important information to increase sales volume and profit margins. Besides order entry, it also provides for creating customer credits, exchanging messages between the office and your DSRs, defining a customer's order guides, generating reports with up to 13 months of sales history, creating quotes and managing new customer prospects.

Your DSR can view your entire product catalog including Dot Foods items, informative dashboards and their customer's open orders, short shipments, and accounts receivable with payment history. If you use our [entrée.DOC](#) software for scanning signed invoices, they can also view those as well.

- For more information visit the **NECS website** to find out about the [Electronic Order Pad](#).
- Contact our **NECS Sales Department** at sales@necs.com for more information.

NECS, Inc.

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

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